SNS: SUPPLY CHAIN DASHBOARD

RELEASE 4.0 USER GUIDE

Version *4.0.1*

February 2010

SAFER • HEALTHIER • PEOPLE™

CDC
Public Health
Informatics

Table of Contents

Welcome

Welcome to CIT

The Centers for Disease Control and Prevention (CDC) Countermeasure Inventory Tracking (CIT) system is a national program to help federal and state emergency response authorities locate critical medical countermeasures during public health emergencies. The SNS: Supply Chain Dashboard project is a Web-based activity found under the H1N1 Countermeasure Dashboard program.

The Dashboard provides visibility of the commercial supply chain and public sector stockpiles to assist decision makers at all levels in responding to the ongoing 2009 H1N1 influenza pandemic. One of its primary purposes is to assist federal and state officials in deciding when it is necessary to release stockpiled assets. The Dashboard provides a view of the overall supply chain to include data on available supply, timeliness to fill orders, and production. This Dashboard will provide key information on assets that can meet demand in the near future (available supply) and in the long term (production). Data on timeliness to fill orders will provide some sense of how demand is being met. It is important to remember that current orders likely include stockpiling at local and facility levels and are not indicative of actual countermeasure usage.

Security has been given top priority for the Dashboard project. In addition to the Dashboard using the Secure Data Network (SDN) environment, Appendix B: Security Requirements Overview explains other security requirements incorporated in the Dashboard.

This user guide provides detailed instructions for contributing data, aggregating the data, and accessing the SNS: Supply Chain Dashboard in the SDN data center.

System Requirements

To log into the H1N1 Countermeasure Inventory Dashboard program, you will need the following:

• Digital certificate that is registered with the CDC SDN. Information about obtaining a digital certificate can be found at:
http://www.cdc.gov/phin/library/documents/pdf/Getting_a_Digital_Certificate_and_Enrolling_into_a_CDC_Program.pdf.

• Administrator rights to the computer(s) so that you can install the certificate. If you do **not** have Administrator rights, a system administrator can install it for you.

• Certificate installed on each computer that will access the Dashboard.

• Access to **H1N1 Countermeasure Inventory Dashboard** program activity - **SNS Influenza Countermeasures Dashboard** through SDN. Access to the SDN program is available after the certificate is installed (refer to https://sdn.cdc.gov).

For the Dashboard to run properly, the following must be installed on your computer:

• Microsoft Internet Explorer Web browser version 7.0 (with cookies and JavaScript enabled)

Additional Help

To receive additional help not covered in this user guide, please use the contact information shown in the table below.

Table 1: Additional Help

For information about:	Do this:
• Aggregate reporting	Contact the SNS Help Desk. **Email**: DSNS-Teamroom@cdc.gov.
• Digital certificates • Accessing the Dashboard demonstration site • General problem solving	Contact the PHIN Help Desk. **Email**: PHINTech@cdc.gov **Phone**: 1-800-532-9929
• General information about CIT	Navigate to http://www.cdc.gov/phin/activities/applications-services/cit/index.html.

Table 1 shows the contact information for questions not addressed in the user guide.

User Role Definitions and Functions

The functions available to you while working in the Dashboard Web Portal vary, depending on your user role—Global Administrator, System Administrator, Public Health Administrator, Data Provider, CDC/SNS User, or SDN Program Digital Certificate Administrator.

User Role Definitions

The following are definitions for each user.

- **Global Administrator:** A CDC representative responsible for supporting the system and providing assistance to users. He/she has full access rights to all Dashboard Web Portal functionality and access rights to the data of all providers.

- **System Administrator:** A CDC representative responsible for supporting the system. He/she has full access rights to all Dashboard Web Portal functionality.

- **Public Health Administrator:** State Health Officers and PHEP Directors who maintain administrative information for the top-level jurisdiction. May maintain jurisdiction, organization, staff, and user data for partner jurisdictions, subordinate jurisdictions, and organizations to which he/she is assigned access rights.

- **Data Provider:** Providers of countermeasure products—manufacturers, retailers, distributors, SNS, and state and local stockpiles.

- **CDC/SNS User:** A CDC or SNS representative who is authorized to view and run Dashboard reports (these reports do not identify any organization private data).

- **SDN Program Digital Certificate Administrator (PDCA):** PDCAs are the CDC personnel specifically designated by agency programs to perform user identity management and application access authorization functions.

  Specific tasks include:

  - Granting users access to application activities,

  - Verifying the identity and appropriateness of potential system users, and

  - Validating existing users.

User Role Functions

Refer to the following items to see which functional areas are available to each user role.

System Setup

Data Collection and Aggregation

View Dashboard

Help

- **System Setup**

  Approve digital certificates, approve the SNS Influenza Countermeasures Dashboard activity, and add users to the Dashboard database, request new users, and request digital certificates.

Table 2: System Setup

Functional Area	Global Admin.	System Admin.	Public Health Admin.	Data Provider	CDC/SNS User	PDCA
• Approve digital certificates	X	X	X	X	X	√
• Approve SNS Influenza Countermeasures Dashboard activity	√	X	X	X	X	√
• Add users to Dashboard database	√	√	X	X	√	X
• Request new users	√	X	√	X	√	X
• Request digital certificate	√	√	√	√	√	√

Table 2 shows the user roles that have access to the System Setup functionality of Dashboard Web Portal. For each functional area, roles that have access are designated by a check mark; those that do not have access are designated by an "x".

- **Data Collection and Aggregation**

    The following two methods of data collection are available:

    - Send provider data in a pre-defined spreadsheet attached to an email to <u>SNS-Dashboard@cdc.gov</u>. SNS drops the spreadsheet in the designated SDN reports folder.

    - Direct data entry of monthly and weekly data using the Dashboard Data Collection activity. This is the preferred method.

Table 3: Data Collection and Aggregation

Functional Area	Global Admin.	System Admin.	Public Health Admin.	Data Provider	CDC/SNS User	PDCA
• Provide data	√	X	X	√	√	X
• Aggregate data	√	X	X	X	X	X
• Create aggregated reports	√	X	X	X	X	X
• Create .jpg of the report image	√	X	X	X	X	X
• Upload aggregate file to SDN directories	√	X	X	X	X	X
• Generate aggregate file	√	X	X	X	X	X
• Web Portal Data Collection – Weekly, Monthly Data Entry	√	√	X	√	√	X

Table 3 shows the user roles that have access to the Data Collection and Aggregation

functionality of Dashboard Web Portal. For each functional area, roles that have access are designated by a check mark; those that do not have access are designated by an "x".

• **View Dashboard**

   View the Dashboard after installing digital certificate and approved access to the CIT SNS Influenza Countermeasures Dashboard activity.

Table 4: View Dashboard

Functional Area	Global Admin.	System Admin.	Public Health Admin.	Data Provider	CDC/SNS User	PDCA
• Dashboard viewing	√	√	√	X	√	√
• Dashboard System Admin	X	√	X	X	X	X
• Dashboard Global Admin	√	X	X	X	√	X

Table 4 shows the user roles that have access to the View Dashboard functionality of CIT. For each functional area, roles that have access are designated by a check mark; those that do not have access are designated by an "x".

- **Help**

  Access to PHIN Helpdesk and CIT website.

Table 5: Help

Functional Area	Global Admin.	System Admin.	Public Health Admin.	Data Provider	CDC/SNS User	PDCA
• PHIN Help Desk • http://www.cdc.gov/phin/resources/tech-assistance.html	√	√	√	√	√	X
• Purpose and Confidentiality Statement • (refer to Appendix C: Purpose and Confidentiality Statement)	√	√	√	√	√	X

Table 5 shows the user roles that have access to the Help functionality of CIT. For each functional area, roles that have access are designated by a check mark; those that do not have access are designated by an "x".

Production Dependencies

CIT relies on the Public Health Information Network Directory (PHINDIR) application to successfully operate in the CDC production environment. This guide assumes that PHINDIR is operational in the production environment.

The PHINDIR project seeks to enhance public health partner communication and collaboration capabilities by ensuring the standards-based exchange of contact information about public health and clinical care personnel among relevant agencies. The PHINDIR architecture supports the security of contact information, as well as the technical needs of increasingly stringent emergency preparedness and response communication.

At the CDC, CIT relies on PHINDIR to provide an enterprise-level directory service for authentication and verification of application users.

Process Flow of the
SNS: Supply Chain Dashboard

Several processes help ensure that the Dashboard works in a smooth and consistent manner. These processes—provider data input process, Dashboard access, and user approval process—are shown below.

SNS: Supply Chain Dashboard
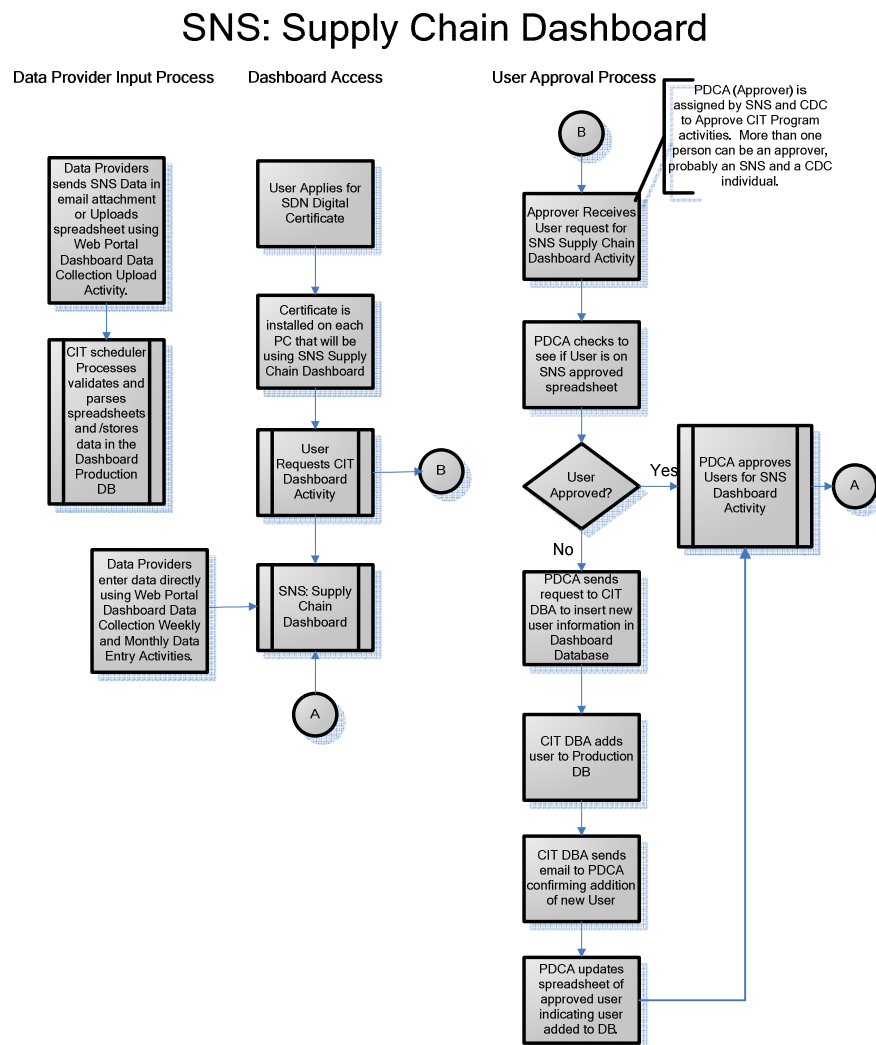
Figure 1: SNS: Supply Chain Dashboard Process Flow

Figure 1 shows the process flow for the SNS: Supply Chain Dashboard. Elements are shown for the provider data input, dashboard access, and user approval processes.

Sending Data to SNS

The following instructions explain how SNS receives inventory supply data and then processes it for display on the SNS: Supply Chain Dashboard.

Notes:

- The Dashboard is not shared with participating commercial partners. CDC/SNS recognizes the need to safeguard all commercial partner data.

- Individual manufacturer-, distributor-, and retailer-reported data will not be shared unless specific consent has been obtained.

- A parallel ongoing process exists to gather state stockpile data. CDC/SNS will add it to the Dashboard as it becomes available.

To send data to SNS:

1. CDC/SNS provides spreadsheet templates to assist in collecting and reporting on the data. Refer to Appendix A: SNS: Supply Chain Dashboard Data Spreadsheets for examples.

2. Data for the Dashboard can be provided by two methods: Email and Web Portal.

   - **Method #1:** Email

     - Manufacturers, distributors, retailers send email to CDC/SNS (SNS-Dashboard@cdc.gov) by close of business on Wednesday of each week.

       The email contains Microsoft Excel attachments that provide inventory supplies of countermeasures used for H1N1.

     - CDC/SNS places the spreadsheet into a folder structure on a secured server named SNSReportInput

- **Method #2:** Web Portal Dashboard Data Collection Weekly and Monthly Data Entry Activity

  - Manufacturers, distributors, retailers, DSNS, and PA/ST (Project Areas and State stockpile) enter their current supply, order fill rating and production quantities directly into the Web Portal Dashboard using the Data Collection's Weekly and Monthly Data Entry activities.

  - The information entered directly updates the Dashboard database.

3. For method #1, the CIT Scheduler validates the spreadsheets and extracts the data, storing it in the Dashboard database.

4. The Dashboard reports are produced dynamically by the system using the date criteria supplied by the user.

Updating Data Files

The SDN environment contains three folders, listed in the table below, that are used strictly for storage of Dashboard spreadsheets. Data entered using the Monthly Data Entry and Weekly Data Entry activities is stored in the database.

Table 6: SDN Environment Folders

Folder	Purpose
AOPS-IRM-SDN860\SNSReportInput	Stores new spreadsheets added by the data providers.
AOPS-IRM-SDN860\SNSReportArchive	Stores processed spreadsheets. Spreadsheets are moved from the SNSReportInput folder during the scheduler process.
AOPS-IRM-SDN860\SNSReportError	Stores any spreadsheets that encountered errors during the scheduler process.

Table 6 lists the SDN environment folders where Dashboard spreadsheets are stored. For each row in the table, the folder and its purpose are shown.

The following steps explain the automated scheduler process used to update the Dashboard database with new data from the spreadsheets for the Dashboard.

1. A CIT scheduled process scans the **SNSReportInput** folder for new spreadsheets.

2. When new spreadsheets are detected, they are validated and parsed. If the spreadsheet processed without errors, it is moved from the **SNSReportInput** folder into the archive folder (**SNSReportArchive)**.

3. The new data is stored in the CIT Dashboard database.

4. If an error occurs while processing a spreadsheet, it is moved to the **SNSReportError** folder and the errors are written to the User Activity Log file.

5. If necessary, spreadsheets can be corrected and resubmitted via email.

   Important! The entire spreadsheet will be replaced, so it is important that the name of the new spreadsheet matches the name of the spreadsheet previously provided.

Applying for and Installing an SDN Digital Certificate

The following instructions explain how to apply for and install an SDN digital certificate.

What would you like to do?

Apply for or install a digital certificate.

Applying for a Certificate

The following instructions explain how to apply for a certificate. Perform these steps for each computer that will access CIT.

To apply for an SDN digital certificate:

1. Navigate to https://ca.cdc.gov. The following page displays:
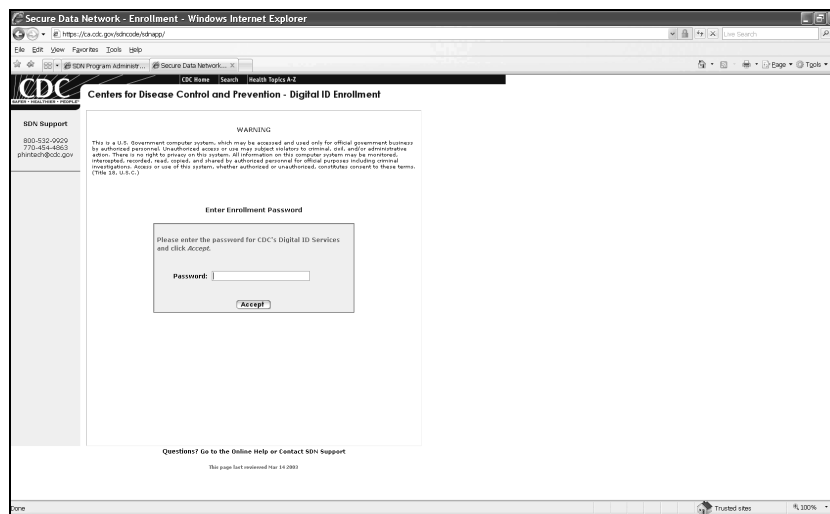
2. In the **Password** field, enter **!cdc_sdn_apply!**, and then click **Accept**. The
    following page displays:
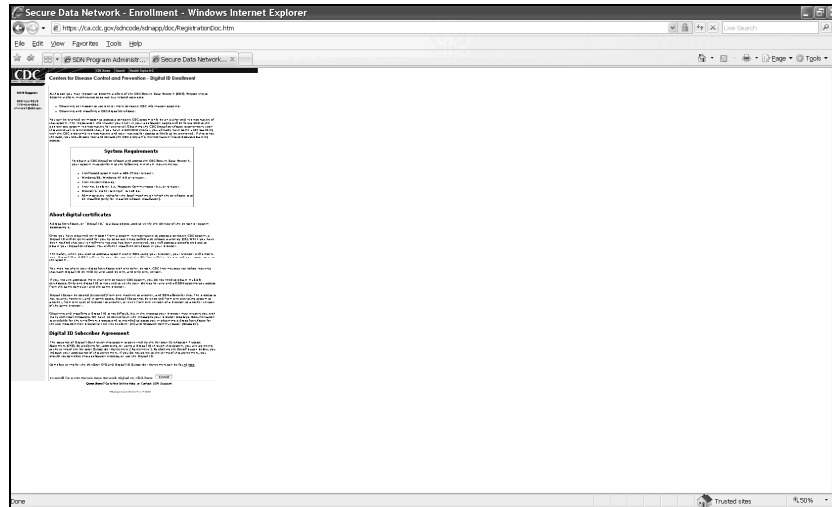
3. After reading the page, click **Enroll**. The following page displays:

4. Fill in the required information, and then click **Next**. The following page displays:
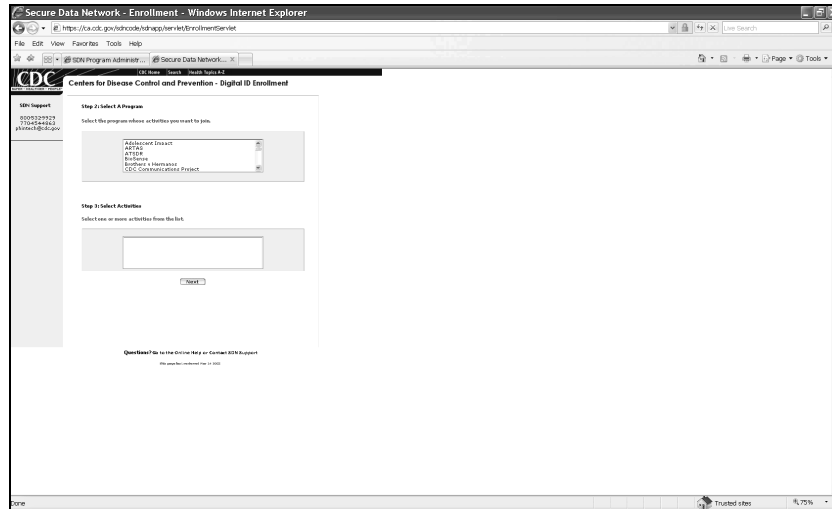
5. Do the following:

   • In the first list, select the **Public Health Directory** program.

   • In the second list, select the **My PHINDIR Profile** activity.

   • Click **Next**. The following page displays:
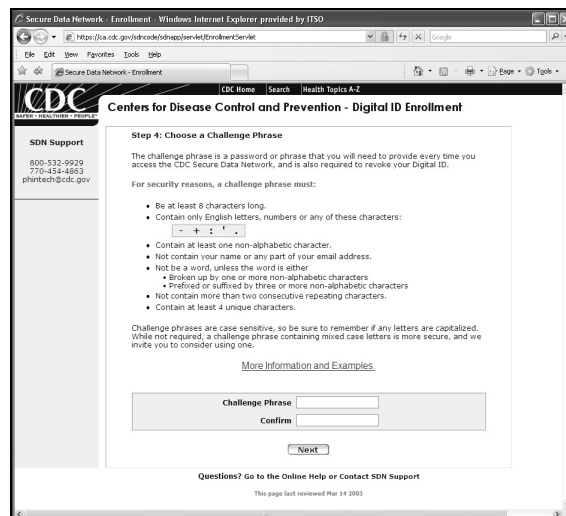
6. In the Challenge **Phrase** field, enter a challenge phrase, and then re-enter it in the **Confirm** field.

   Notes:

   - A challenge phrase is a password you use each time you access the SDN website. You will also need it should you ever decide to revoke your digital ID.

   - It is very important to record your challenge phrase and store it in a secure location so that you do not forget it, as you will be required to enter it each time you access the SDN website.

   - For security reasons, a challenge phrase must:

     - Be at least eight characters long.

     - Contain only English letters, numbers or any of these characters: - + : ' .

     - Contain at least one non-alphabetic character.

     - Not contain your name or any part of your email address.

     - Not be a word, unless the word is either

       ▪ Broken up by one or more non-alphabetic characters

       ▪ Prefixed or suffixed by three or more non-alphabetic characters

     - Not contain more than two consecutive repeating characters.

     - Contain at least four unique characters.

     - Challenge phrases are case sensitive, so be sure to remember if any letters are capitalized. While not required, a challenge phrase containing mixed case letters is more secure, and we invite you to consider using one.

7. Click **Next** to submit your request for a certificate.

Installing the Certificate

After your request for a certificate has been approved, you will receive a confirmation email from PHINTech@cdc.gov with instructions for installing the certificate.

You must have Administrator rights on your computer to install the certificate; if you do not, your system administrator can install it for you. The email will contain instructions for the system administrator and the digital certificate installation.

Each computer that will access CIT must have a digital certificate installed.

Applying for Access to the
SNS: Supply Chain Dashboard

The following instructions explain how to apply for access to the SNS: Supply Chain Dashboard. Each computer that will use the SNS Supply Chain Dashboard must apply for access.

Before you begin . . . verify that each computer that will access the Dashboard has a digital certificate installed. For further information, see Applying for and Installing an SDN Digital Certificate.

To apply for access to the Dashboard:

1. Navigate to https://sdn.cdc.gov. The following page displays:
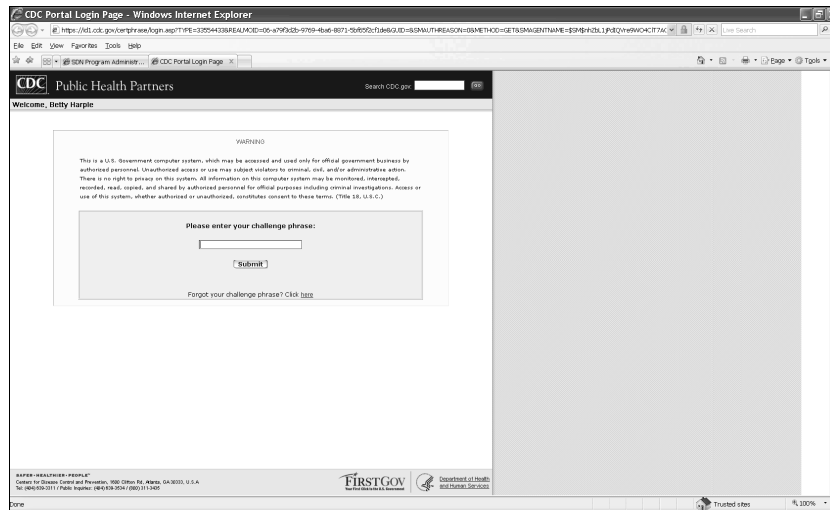
2. Enter the challenge phrase you created when you applied for your digital certificate, and click **Submit**. The following page displays:
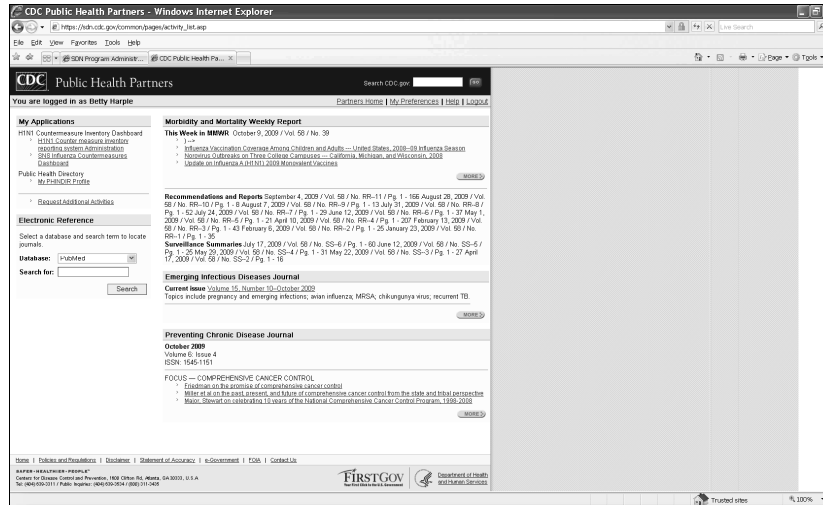
3. On the left-hand side of the page, click the **Request Additional Activities** link. The following page displays:
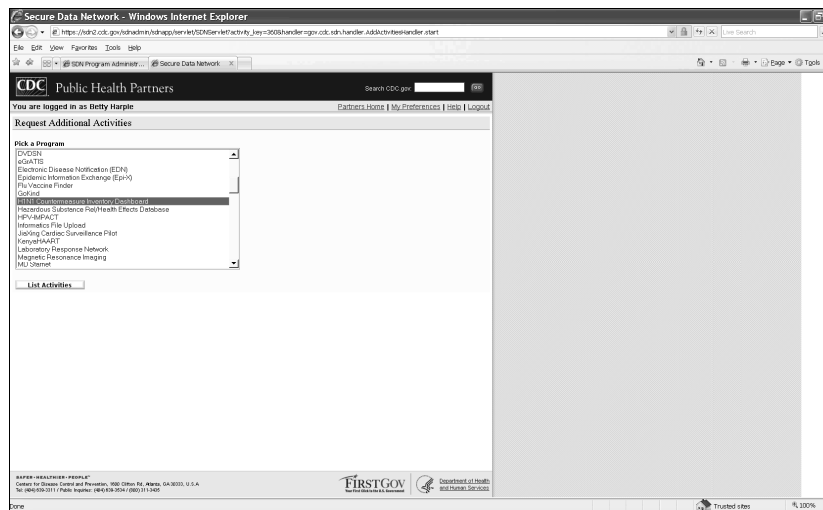
4. In the list, select **H1N1 Countermeasure Inventory Dashboard**, and click **List Activities**. Additional fields display on the page.

5. In the **Available Activities** list, select **SNS: Supply Chain Dashboard**, and click the **Add** button. The activity moves to the **Selected Activities** list.

6. Click **Request Activities**. The request for the activity is emailed to the PDCA-authorized approver (this is the Program Approver assigned by the CDC and SNS).

Approving a User for Access to the SNS: Supply Chain Dashboard

The following instructions explain how a PDCA (Program Approver) approves a user for the SNS Influenza Countermeasures Dashboard activity so he/she can access the Dashboard.

Before you begin . . . verify that the following steps have been taken:

1. The Global Administrator adds the new user to the Dashboard using the Global Admin User Maintenance activity. For instructions on adding a new user, refer to Maintaining Dashboard Users (Add a User).

2. SNS instructed the user to register for the SNS: Supply Chain Dashboard activity.

3. The PDCA received the activity request.

To approve a user for Dashboard access:

1. Verify that the user has been added to the CIT Dashboard database.

   Do this by searching for the person using the Global Admin User Maintenance activity. For instructions on searching for a user, refer to Maintaining Dashboard Users (Search for a User).

2. Navigate to https://sdnadmin.cdc.gov/, and enter the challenge phrase.
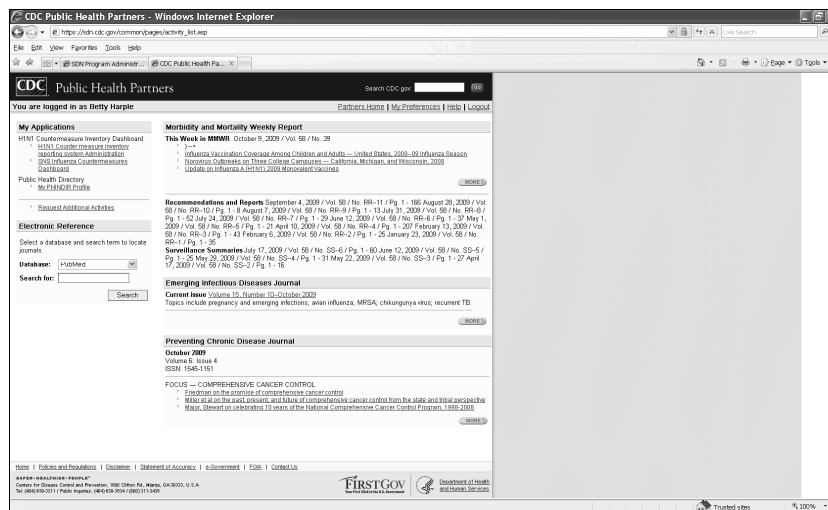
3. Select the activity **SNS: Supply Chain Dashboard**.
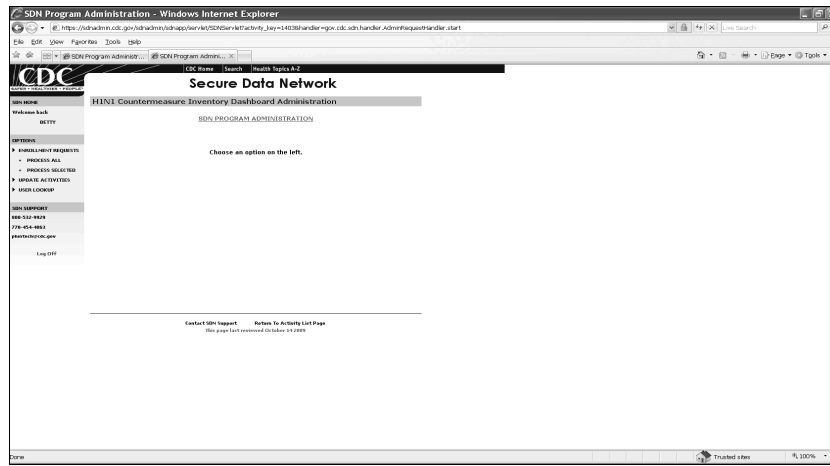
4. In the navigation pane, click **Process Selected**.

5. Do one of the following:

    • Select **Approve user request** if the user has been added to the CIT database. An email is sent to the user.

    • Select **Deny user request** if the user's name is not in the SNS-approved spreadsheet. An email is sent to the user.

Removing a User from the SNS: Supply Chain Dashboard

To remove a user from an activity so that he/she can no longer access the Dashboard, refer to the PDF document entitled *SDN Guide for PDCAs*.

In the document, navigate to section 3.4 UPDATE ACTIVITIES ->LIST ACTIVITIES -> REMOVE AN ACTIVITY TO A USER**.**

The Global Administrator can also temporarily inactivate a Dashboard user using the Global Admin User Maintenance activity. For instructions, refer to <u>Maintaining Dashboard Users (Modify a User)</u>.

Logging In and Out of the SNS: Supply Chain Dashboard

The following instructions explain how to log in and out of the Dashboard.

What would you like to do?

Log in to or log out of the Dashboard.

Logging in to the Dashboard

The following instructions explain how to log in to the Dashboard.

Before you begin . . . to log in to the Dashboard, you will need the following:

- A digital certificate installed on each computer that will access the Dashboard. For more information about obtaining a certificate, refer to <u>System Requirements.</u>

- Access to the SNS: Supply Chain Dashboard activity through SDN. For instructions on gaining access, refer to <u>Applying for Access to the SNS: Supply Chain Dashboard</u>

To log in to the Dashboard:

1. Navigate to <u>https://sdnadmin.cdc.gov/</u> .

2. Enter your challenge phrase, and click **Submit**. The **CDC SDN Activity** page displays.

3. Select **SNS Supply Chain Dashboard**. The **Purpose and Confidentiality Statement** page displays.

The information on this page dictates how the system is to be used, and each user must agree to the rules before using the system. Refer to <u>Appendix C: Purpose and Confidentiality Statement</u> to see the agreement that is presented on this page.

4. Carefully read the Purpose and Confidentiality statement, and then do one of the following at the bottom of the page:

- Click **Agree** if you accept the agreement. The SNS: Supply Chain Dashboard specific to your user role displays. You are now ready to view reports.

- Click **Decline** if you disagree with the agreement. The message **"**You will not be allowed access to this application" displays.

Logging out of the Dashboard

The following instructions explain how to log out of the Dashboard.

To log out of the Dashboard:

1. Click the **Return to Activity List Page** link. The **CDC SDN Activity** page displays.
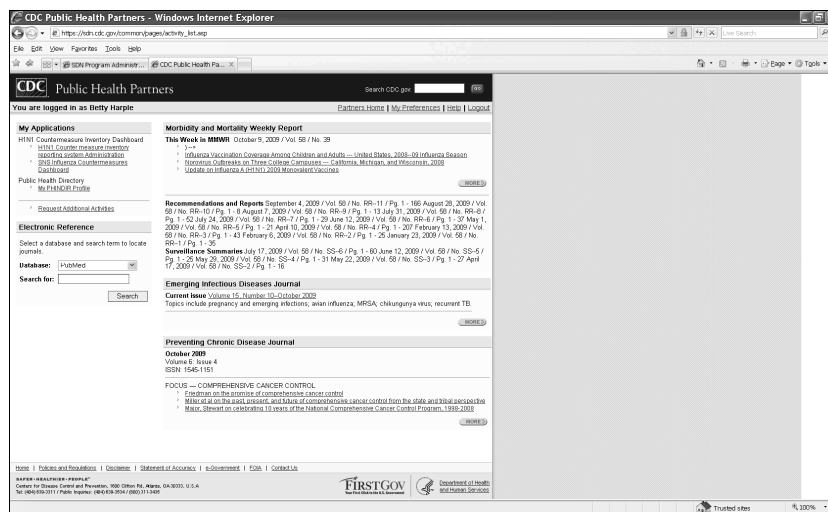
2. Click the **Logout** link in the upper-right corner of the page.

3. To log in again, do the following:

   - Click the **Login** link.

   - On the page that displays, enter your challenge phrase, and click **Submit**.

Viewing Reports

The following instructions explain how to view reports on the Dashboard.

Important! No options for printing, copying, or downloading the Dashboard data are provided. Every possible way of technically preventing these operations has been implemented.

Global Administrators and System Administrators are the exception—they have the authority to print, copy, and download from the Report view.

Report naming convention

The report naming convention is **mm-dd-yyyy reporttype** which indicates the date and type of report.

Example

09-17-2009 Current Supply, where:

- 09-17-2009 = mm-dd-yyyy (month-day-year)

- Current Supply = report type
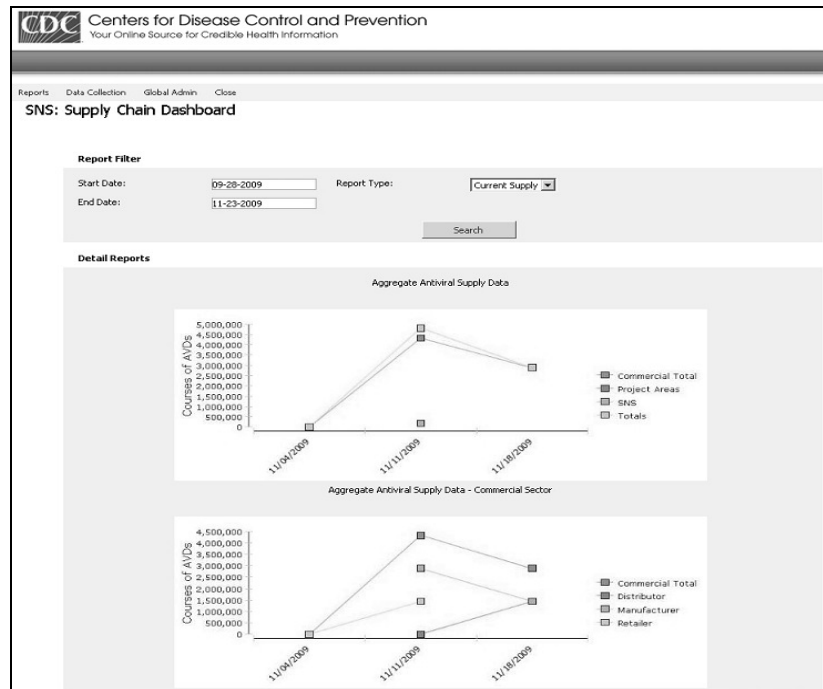
Figure 2: Reports

Figure 2 shows the reports on the SNS: Supply Chain Dashboard. This page displays after you log in.

To view a report:

1. The reports shown are the most current reports for the period. To view reports for a different period of time, enter a start date and/or end date in the **Start Date** and **End Date** fields.

   - If you enter a start date without an end date, the system displays the message "Enter an end date".

   - If you enter an end date without a start date, the system displays the message: "Enter a start date.

     The **Week of** field displays all reports for the date range you entered.

2. In the **Report Type** field, select the report you would like to view. The system refreshes the report page and displays the report you selected.

Collecting Data

The following instructions explain how to enter monthly and weekly data into the Dashboard. Several options are available; your user role determines which method(s) you are authorized to use.

What would you like to do?

Enter monthly data or weekly data.

Entering Monthly Data

The following instructions explain how to enter monthly data directly into the Dashboard. Global Administrators and Manufacturers are authorized to perform this task.

This type of data entry entails entering the following:

• Expected production for the next twelve months for use in the United States

• Quantity of production each month that is uncommitted and available for purchase

To enter monthly data:

1. Is the **Data Collection** page currently displayed on your screen?

    • If **Yes**, continue to step 2.

    • If **No**, click the **Data Collection** menu link.

2. Under the **Data Collection** heading, click the **Monthly Data Entry** link. The **Monthly Data Entry** page displays.

3. The information in the **Provider** field varies by user. Which type of user are you?

    • **Manufacturer**: The **Provider** field defaults to the business entity you are authorized to enter data for. Continue to step 4.

    • **Global Administrator**: In the **Provider** field, select the manufacturing data provider you are entering data for.

4. In the **Date as of** field, specify the date for which you are entering data. Do one of the following:

    • Enter the date in mm-dd-yyyy format.

    • Click in the field to display a calendar, and then select the date.

5. In the **Product Family** field, select the countermeasures you are entering totals for (antiviral drugs or respiratory protective devices).

6. Click the **Go** button. The form to enter the data displays.

Any data that has already been entered for the date displayed in the **Date as of** field is shown in the form.

Note: Any field name containing an asterisk (*), such as the **High Barrier *** field, indicates a product that has further product descriptive information. To view the description, move the cursor over the field name (also referred to as hovering).

7. Enter production totals and uncommitted totals for up to 12 months in the future.

    If you are a Manufacturer, you can enter production totals for today's date or a future date, but not for a date in the past. Additionally, you can view, but not modify, past data.

8. Click the **Save** button. The system saves the information you entered.

Entering Weekly Data

The following instructions explain how to enter various types of weekly data directly into the Dashboard. The following users are authorized to perform this task, depending upon the type of data entered:

• Global Administrators

• Manufacturers

• Distributors

• Retailers

• SNS users

Weekly data represents the current available supply and reflects on-hand, available product that is not committed to customers. In addition, Distributors and Retailers can enter their order fill rating, which reflects their timeliness to fill orders. SNS users can enter the estimated weekly prescription totals.

What type of data would you like to enter?

SNS weekly data

Weekly data for project areas and state stockpiles

Manufacturer weekly data

Distributor weekly data

Retailer weekly data

Enter SNS Weekly Data

The following instructions explain how to enter the quantity on-hand and available for deployment in the SNS and the estimated weekly prescriptions for antivirals.

Global Administrators and SNS users are authorized to perform this task.

To enter SNS weekly data:

1. Is the **Data Collection** page currently displayed on your screen?

    • If **Yes**, continue to step 2.

    • If **No**, click the **Data Collection** menu link.

2. Under the **Data Collection** heading, click the **Weekly Data Entry** link. The **Weekly Data Entry** page displays.
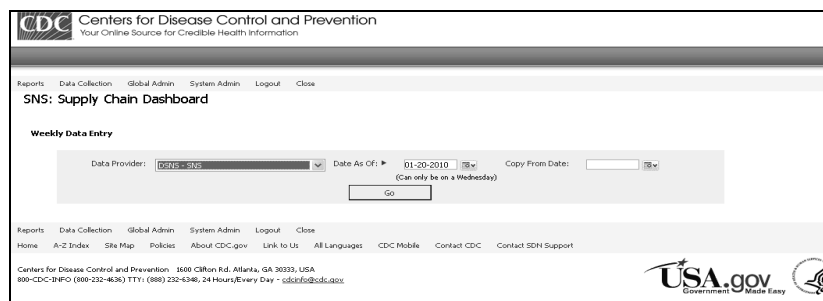
3. In the **Provider** field, select **DSNS – SNS**.

4. In the **Date as of** field, specify the date (Wednesday only) you are entering data for.

    Do one of the following:

    • Enter the date in mm-dd-yyyy format.

    • Click in the field to display a calendar, and then select the date.

    • Click on the calendar object to display a calendar, and then select the date.

5. In the **Copy From Date** field, specify the date you are want to copy data from.

    Do one of the following:

    • Enter the date in mm-dd-yyyy format.

    • Click in the field to display a calendar, and then select the date.

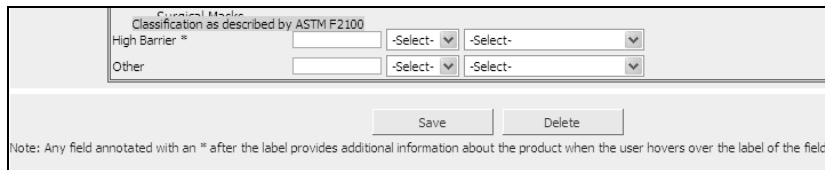   • Click on the calendar object to display a calendar, and then select the date.

6. Click the **Go** button. The form to enter the data displays. If you entered a date in the **Copy From Date** field, the date is displayed in the form.

7. For each countermeasure, enter the current supply in the **Supply Qty** field.

8. For each antiviral countermeasure, enter the estimated weekly prescriptions in the **Prescription Qty** field.

   Note: Any field name containing an asterisk (*), such as the **High Barrier *** field, indicates a product that has further product descriptive information. To view the description, move the cursor over the field name (also referred to as hovering).

9. Click the **Save** button. The system saves the information you entered.

Enter Weekly Data for Project Areas and State Stockpiles

The following instructions explain how to enter the quantity on hand and available for deployment in project areas and state stockpiles.

Global Administrators are authorized to perform this task.

To enter weekly data for project areas and state stockpiles:

1. Is the **Data Collection** page currently displayed on your screen?

   - If **Yes**, continue to step 2.

   - If **No**, click the **Data Collection** menu link.

2. Under the **Data Collection** heading, click the **Weekly Data Entry** link. The **Weekly Data Entry** page displays.

3. In the **Provider** field, select **Project Areas – State Stockpile**.

4. In the **Date as of** field, specify the date (Wednesday only) you are entering data for.

   Do one of the following:

   - Enter the date in mm-dd-yyyy format.

   - Click in the field to display a calendar, and then select the date.

   - Click on the calendar object to display a calendar, and then select the date.

5. In the **Copy From Date** field, specify the date you are want to copy from data.

   Do one of the following:

   - Enter the date in mm-dd-yyyy format.

   - Click in the field to display a calendar, and then select the date.

   - Click on the calendar object to display a calendar, and then select the date.

6. Click the **Go** button. The form to enter the data displays.

7. For each countermeasure, enter the current supply in the **Supply Qty** field.

   Note: Any field name containing an asterisk (*), such as the **High Barrier ***
   field, indicates a product that has further product descriptive information. To
   view the description, move the cursor over the field name (also referred to as
   hovering).

8. Click the **Save** button. The system saves the information you entered.

Enter Manufacturer Weekly Data

The following instructions explain how to enter the quantity on hand and available (not committed to customers).

Global Administrators and Manufacturers are authorized to perform this task.

To enter Manufacturer weekly data:

1. Is the **Data Collection** page currently displayed on your screen?

   - If **Yes**, continue to step 2.

   - If **No**, click the **Data Collection** menu link.

2. Under the **Data Collection** heading, click the **Weekly Data Entry** link. The **Weekly Data Entry** page displays.

3. The information in the **Provider** field varies by user. Which type of user are you?

   - **Manufacturer**: The **Provider** field defaults to the business entity you are authorized to enter data for. Continue to step 4.

   - **Global Administrator**: In the **Provider** field, select the manufacturing data provider you are entering data for.

4. In the **Date as of** field, specify the date (Wednesday only) for which you are entering data. Do one of the following:

   - Enter the date in mm-dd-yyyy format.

   - Click in the field to display a calendar, and then select the date.

5. Are you a Global Administrator?

   - If **No**, continue to step 6.

   - If **Yes**, in the **Copy From Date** field, specify the date you want to copy data from.

     Do one of the following:

     - Enter the date in mm-dd-yyyy format.

     - Click in the field to display a calendar, and then select the date.

     - Click on the calendar object to display a calendar, and then select the date.

6. Click the **Go** button. The form to enter the data displays.

7. For each countermeasure, enter the current supply in the **Supply Qty** field.

   Note: Any field name containing an asterisk (*), such as the **High Barrier ***
   field, indicates a product that has further product descriptive information. To
   view the description, move the cursor over the field name (also referred to as
   hovering).

8. Click the **Save** button. The system saves the information you entered.

Enter Distributor Weekly Data

The following instructions explain how to enter the quantity on hand and available (not committed to customers) and the order fill rating. The rating indicates your company's current order fill status for each countermeasure.

Global Administrators and Distributors are authorized to perform this task.

To enter Distributor weekly data:

1. Is the **Data Collection** page currently displayed on your screen?

    • If **Yes**, continue to step 2.

    • If **No**, click the **Data Collection** menu link.

2. Under the **Data Collection** heading, click the **Weekly Data Entry** link. The **Weekly Data Entry** page displays.

3. The information in the **Provider** field varies by user. Which type of user are you?

    - **Distributor**: The **Provider** field defaults to the business entity you are authorized to enter data for. Continue to step 4.

    - **Global Administrator**: In the **Provider** field, select the distributor you are entering data for.

4. In the **Date as of** field, specify the date (Wednesday only) for which you are entering data. Do one of the following:

    - Enter the date in mm-dd-yyyy format.

    - Click in the field to display a calendar, and then select the date.

5. Are you a Global Administrator?

    - If **No**, continue to step 6.

    - If **Yes**, in the **Copy From Date** field, specify the date you want to copy data from.

        Do one of the following:

        - Enter the date in mm-dd-yyyy format.

        - Click in the field to display a calendar, and then select the date.

        - Click on the calendar object to display a calendar, and then select the date.

6. Click the **Go** button. The form to enter the data displays.

7. For each countermeasure, do the following;

- Enter the current supply in the **Supply Qty** field.

- Select the order fill rating in the **Rating** field.

- Select the reason for the rating in the **Reason** field.

Note: Any field name containing an asterisk (*), such as the **High Barrier ***
field, indicates a product that has further product descriptive information. To
view the description, move the cursor over the field name (also referred to as
hovering).

8. Click the **Save** button. The system saves the information you entered.

Enter Retailer Weekly Data

The following instructions explain how to enter the quantity on hand and available (not committed to customers) and the order fill rating. The rating indicates your company's current order fill status for each countermeasure.

Global Administrators and Retailers are authorized to perform this task.

To enter Retailer weekly data:

1. Is the **Data Collection** page currently displayed on your screen?

   - If **Yes**, continue to step 2.

   - If **No**, click the **Data Collection** menu link.

2. Under the **Data Collection** heading, click the **Weekly Data Entry** link. The **Weekly Data Entry** page displays.

---
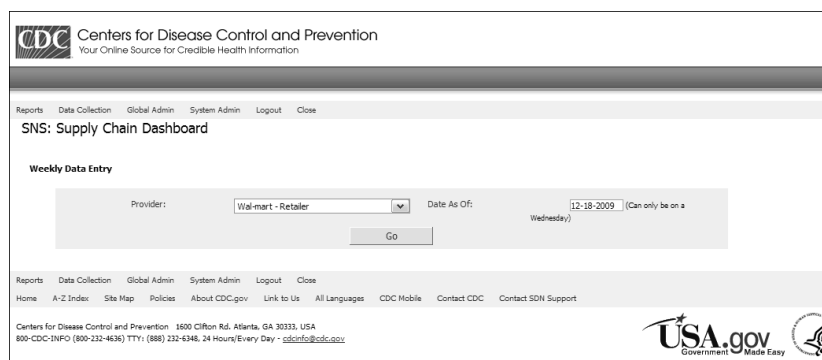
3. The information in the **Provider** field varies by user. Which type of user are you?

   - **Retailer**: The **Provider** field defaults to the business entity you are authorized to enter data for. Continue to step 4.

   - **Global Administrator**: In the **Provider** field, select the distributor you are entering data for.

4. In the **Date as of** field, specify the date (Wednesday only) for which you are entering data. Do one of the following:

   - Enter the date in mm-dd-yyyy format.

   - Click in the field to display a calendar, and then select the date.

5. Are you a Global Administrator?

   - If **No**, continue to step 6.

   - If **Yes**, in the **Copy From Date** field, specify the date you are want to copy from data.

     Do one of the following:

     - Enter the date in mm-dd-yyyy format.

     - Click in the field to display a calendar, and then select the date.

     - Click on the calendar object to display a calendar, and then select the date.

6. Click the **Go** button. The form to enter the data displays.

7. For each countermeasure, do the following;

- Enter the current supply in the **Supply Qty** field.

- Select the order fill rating in the **Rating** field.

- Select the reason for the rating in the **Reason** field.

 Note: Any field name containing an asterisk (*), such as the **High Barrier ***
 field, indicates a product that has further product descriptive information. To
 view the description, move the cursor over the field name (also referred to as
 hovering).

8. Click the **Save** button. The system saves the information you entered.

Assigning the Global Administrator Role

The following instructions explain how to assign users the role of Global Administrator.

The Global Administrator role is assigned to the CDC/SNS user(s) responsible for monitoring the user activity on the Dashboard. This role is assigned by SNS and communicated to the CIT DBA, who then updates the Business User Role table with the authorized user's ID.

To assign the Global Administrator role:

1. CDC/SNS decides who should have access to the **Global Admin** activities from the Dashboard.

2. The System Administrator or a Global Administrator can use the Global Admin User Maintenance activity to assign the Global Admin role to a user.

    -   To assign the role when adding a new user, refer to <u>Maintaining Dashboard Users (Add a User)</u>.

    -   To assign the role to an existing user, refer to <u>Maintaining Dashboard Users (Modify a User)</u>.

Performing Global Administrator Tasks

The instructions in this section describe the tasks that Global Administrators are authorized to perform.

What would you like to do?

- Maintain code table values (search, add, modify, or delete)

- Maintain countermeasure product families (search, add, modify or delete)

- Maintain countermeasure products (search, add, modify or delete)

- Maintain Dashboard users (search, add, or modify)

- View user activity information

- Maintain data providers (search, add, or modify)

- Set up data provider countermeasures

- Assign and view data provider market share

- Switch between static and dynamic reports

- Request internal reports

- View an online version of the SNS Dashboard User Guide

Maintaining Code Table Values

The following instructions explain how to maintain code table values.

Code tables are used in the Dashboard so that codes can be assigned meaningful values by the user. For example, the values assigned to the Status code for a user can be **Active**, **Inactive**, or **New**.

What would you like to do?

Search for, add, modify, or delete a code table value.

Search for Code Table Values

The following instructions explain how to search for the values assigned to a code table.

To search for code table values:

1. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.
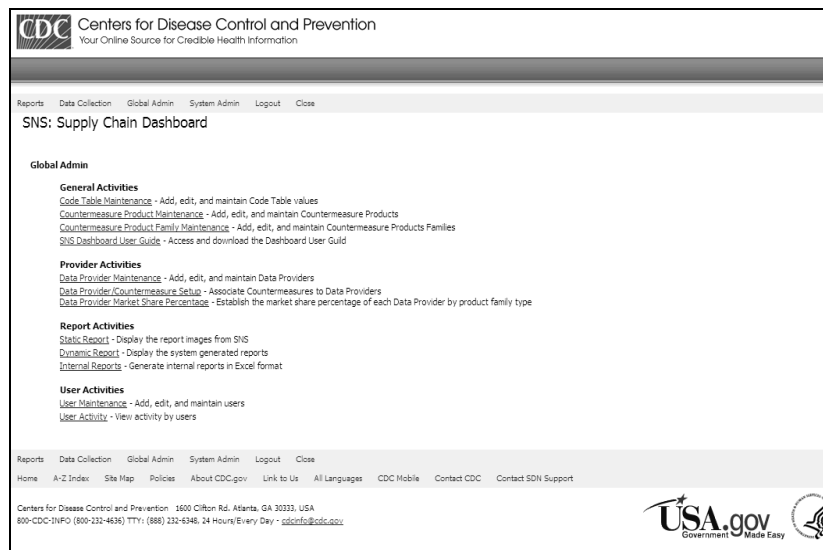
2. Under the **General Activities** heading, click the **Code Table Maintenance** link. The **Code Table Type Search** page displays.
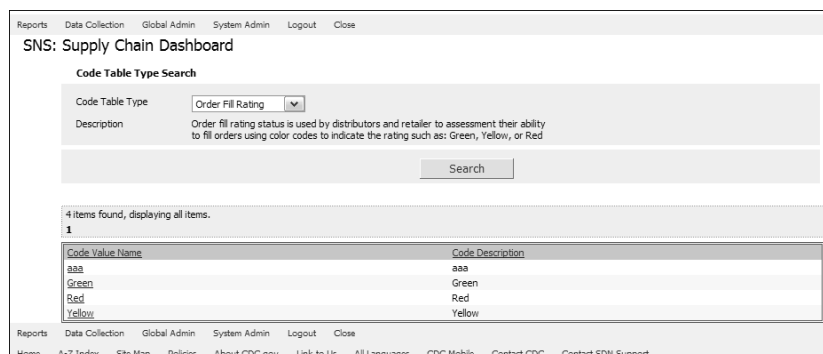
3. In the **Code Table Type** field, select the type of table whose values you want to search for.

4. Click the **Search** button. The associated code values and their descriptions display.

5. If desired, do one of the following:

   - Sort the values in ascending or descending order by clicking on a column heading and then clicking the arrow next to it.

   - Add a code table value (refer to Add a Code Table Value)

   - Modify a code table value (refer to Modify a Code Table Value)

   - Delete a code table value (refer to Delete a Code Table Value)

   Notes:

   - Because the system uses the values in the **Order Fill Rating** table, the values in that table cannot be added, modified or deleted.

   - Any values currently being used by the system cannot be deleted.

6. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close**

Add a Code Table Value

The following instructions explain how to add a new value to a code table.

Note: Because the system uses the values in the **Order Fill Rating** table, new values cannot be added to it.

To add a code table value:

1. Search for the code table that you want to add a new value to (refer to Search for Code Table Values for instructions).

2. On the Search for **Code Table Type Search** page, click the **Add** button. The **Add a Code Value** page displays.

3. In the **Code Value Name** field, enter a name for the value.

4. In the **Description** field, enter text that describes the value.

5. Click the **Save** button. The system saves the information you entered.

6. To exit the page, click one of the following menu links at the top of the page:
   Reports, **Global Admin**, or **Close.**

Modify a Code Table Value

The following instructions explain how to make changes to a code table value.

Note: Because the system uses the values in the **Order Fill Rating** table, the values cannot be modified.

To modify a code table value:

1. Search for the code table value you want to modify (refer to <u>Search for Code Table Values</u> for instructions), and then select the value to display its information. The **Edit a Code Value** page displays.

2. In the **Description** field, enter text that describes the value.

3. Click the **Save** button. The system saves the changes you made.

4. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

Delete a Code Table Value

The following instructions explain how to delete an existing code table value.

Notes:

• Because the system uses the values in the **Order Fill Rating** table, the values cannot be deleted.

• Codes currently being used by the system cannot be deleted.

To delete a code table value:

1. Search for the code table value you want to delete (refer to Search for Code Table Values for instructions), and then select it to display its information. The **Edit a Code Value** page displays.

2. Click the **Delete** button. A confirmation message displays.

3. Click the **OK** button. The system deletes the value.

4. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

Maintaining Countermeasure Product Families

The following instructions explain how to search for, add, modify, or delete countermeasure product families. For instructions on maintaining countermeasure products, refer to Maintaining Countermeasure Products.

Countermeasures used for reporting in the Dashboard are categorized by product family *type* (such as antiviral drugs or respiratory protective devices). Within each type, the countermeasures are further categorized by product family *name*, which is the product trade name or catalog name (Oseltamivir, for example).

What would you like to do?

Search for, add, modify or delete a countermeasure product family.

Search for Countermeasure Product Families

The following instructions explain how to search for the countermeasure product families associated with a particular product family type.

To search for countermeasure product families:

1. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.
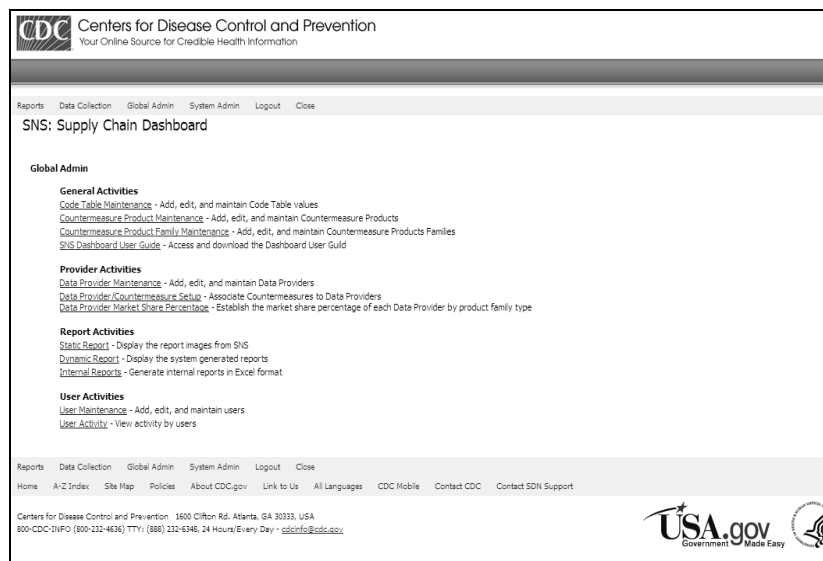
2. Under the **General Activities** heading, click the **Countermeasure Product Family Maintenance** link. The **Countermeasure Product Family Search** page displays.
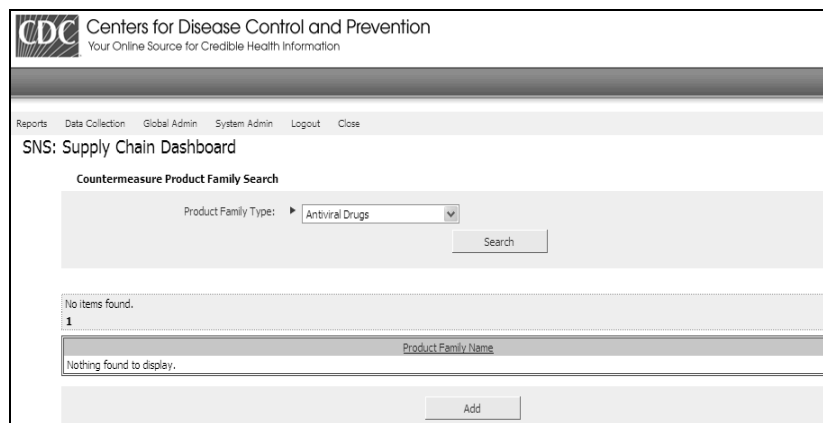
3. In the **Product Family Type** field, select the type of product family names you want to search for.

4. Click the **Search** button. The product family names display.

5. If desired, do one of the following:

   • Sort the names in ascending or descending order by clicking the **Product Family Name** column heading and then clicking the arrow next to it.

   • Add a product family (refer to <u>Add a Countermeasure Product Family</u>)

   • Modify a product family (refer to <u>Modify a Countermeasure Product Family</u>)

   • Delete a product family (refer to <u>Delete a Countermeasure Product Family</u>)

     Note: Product families currently being used by the system cannot be deleted.

6. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close**.

Add a Countermeasure Product Family

The following instructions explain how to add a new countermeasure product family.

To add a countermeasure product family:

1. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.

2. Under the **General Activities** heading, click the **Countermeasure Product Family Maintenance** link. The **Countermeasure Product Family Search** page displays.

3. Click the **Add** button. The **Add Countermeasure Product Family** page displays.

4. In the **Product Family Type** field, verify that the type displayed is the one you want to add the family to.

5. In the **Product Family Name** field, enter a name for the product family.

6. If desired, enter a description in the **Product Family Description** field.

7. Click the **Save** button. The system saves the information you entered.
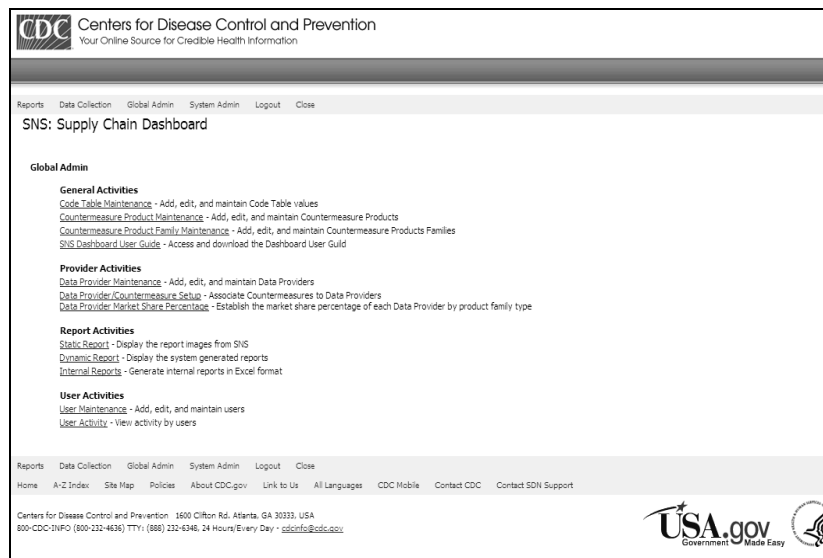
8. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close**.

Modify a Countermeasure Product Family

The following instructions explain how to make changes to a countermeasure product family.

To modify a countermeasure product family:

1. Search for the product family you want to modify (refer to <u>Search for Countermeasure Product Families</u> for instructions), and then select it to display its information. The **Edit Countermeasure Product Family** page displays.

2. Make any necessary changes to the information.

3. Click the **Save** button. The system saves the changes you made.

4. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**
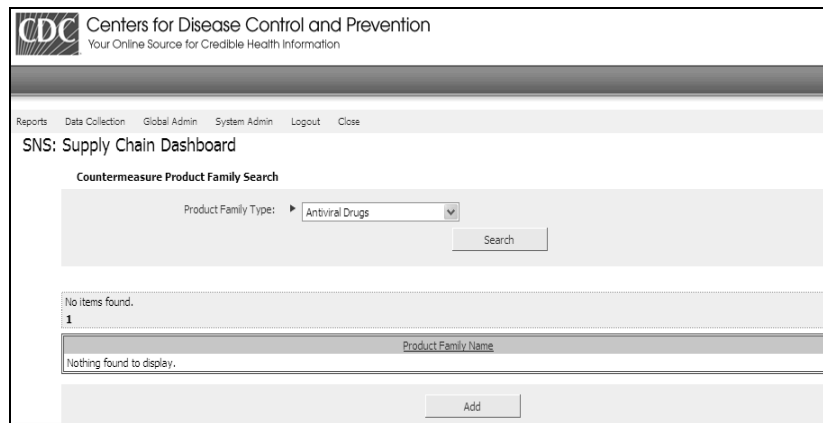
Delete a Countermeasure Product Family

The following instructions explain how to delete a countermeasure product family.

Note: Product families currently being used by the system cannot be deleted.

To delete a countermeasure product family:

1. Search for the product family you want to delete (refer to Search for Countermeasure Product Families for instructions), and then select it to display its information. The **Edit Countermeasure Product Family** displays.

2. Click the **Delete** button. A confirmation message displays.

3. Click the **OK** button. The system deletes the product family.

4. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

Maintaining Countermeasure Products

The following instructions explain how to search for, add, modify, or delete countermeasure products. For instructions on maintaining countermeasure product families, refer to Maintaining Countermeasure Product Families.

Countermeasures used for reporting in the Dashboard are categorized by product family *type* (such as antiviral drugs or respiratory protective devices). Within each type, the countermeasures are further categorized by product family *name*, which is the product trade name or catalog name (Oseltamivir, for example).

What would you like to do?

Search for, add, modify or delete a countermeasure product.

Search for Countermeasure Products

The following instructions explain how to search for countermeasure products associated with a particular product family type and, optionally, product family name.

To search for countermeasure products:

1. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.
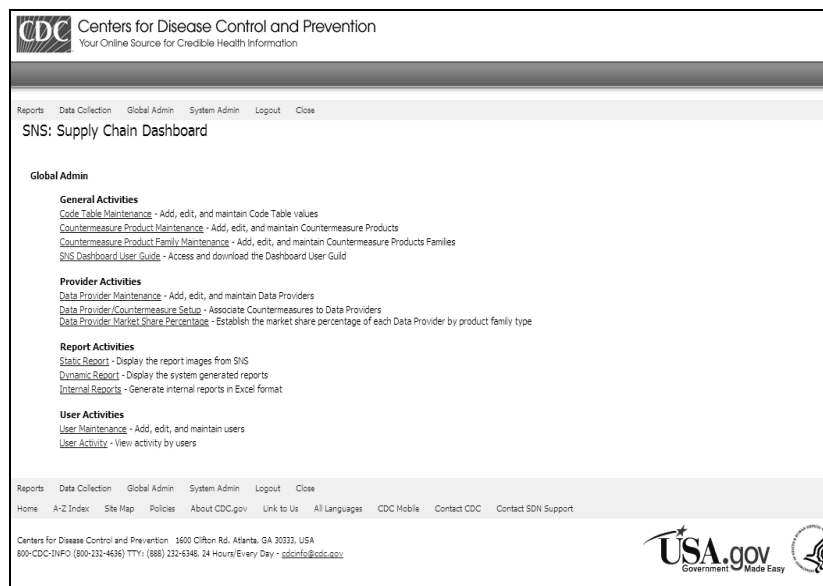
2. Under the **General Activities** heading, click the **Countermeasure Product Maintenance** link. The **Countermeasure Product Search** page displays.
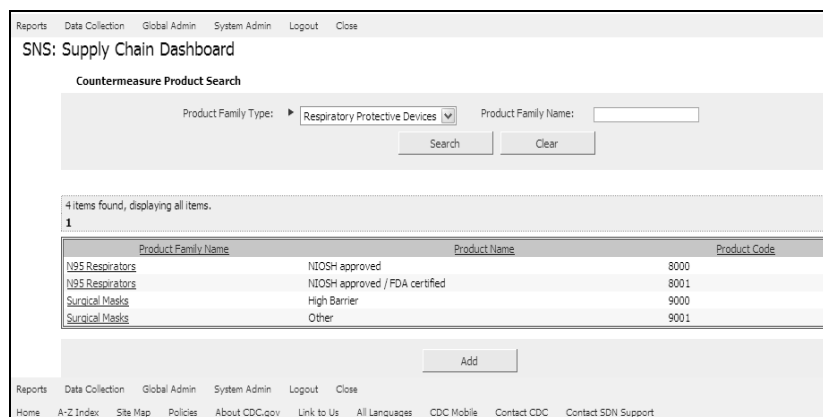
3. In the **Product Family Type** field, select the type the product belongs to.

4. You can further refine your search by entering the family name the product belongs to in the **Product Family Name** field.

5. Click the **Search** button. The products that meet the search criteria are displayed.

6. If desired, do one of the following:

    - Sort the products in ascending or descending order by clicking a column heading and then clicking the arrow next to it.

    - Add a countermeasure product (refer to <u>Add a Countermeasure Product</u>)

    - Modify a countermeasure product (refer to <u>Modify a Countermeasure Product</u>)

    - Delete a countermeasure product (refer to <u>Delete a Countermeasure Product</u>)

       Note: Products currently being used by the system cannot be deleted.

7. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

Add a Countermeasure Product

The following instructions explain how to add a new countermeasure product.

To add a countermeasure product:

1. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.
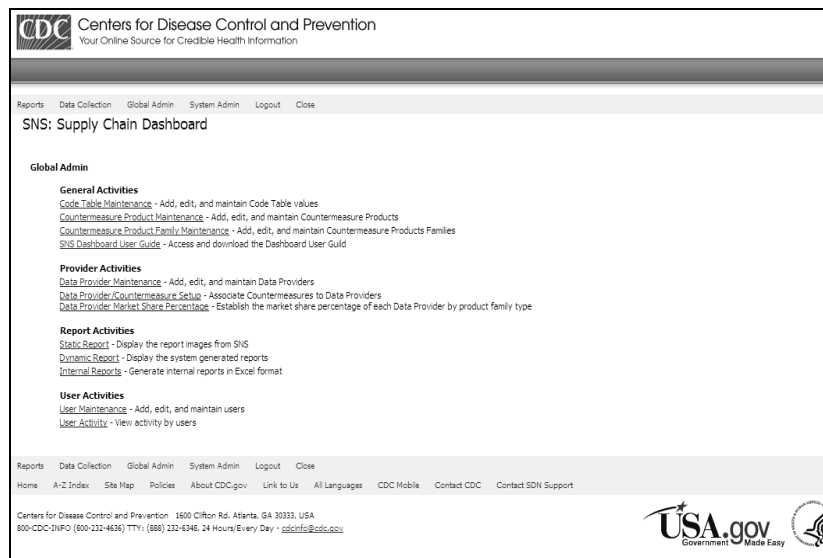
2. Under the **General Activities** heading, click the **Countermeasure Product Maintenance** link. The **Countermeasure Product Search** page displays.
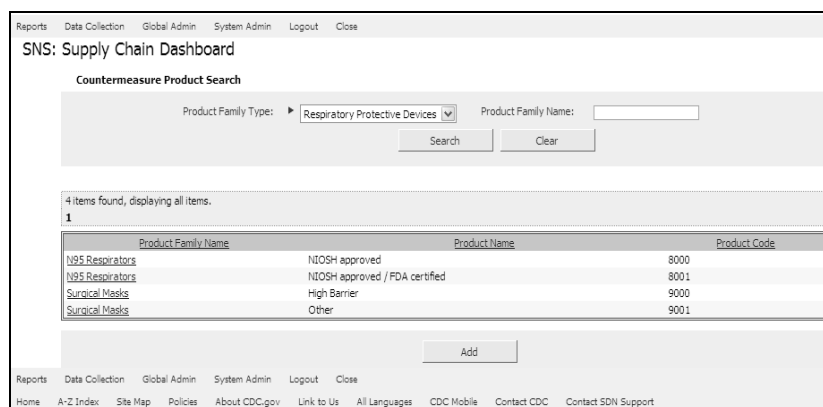
3. In the **Product Family Type** field, select the type of family the product belongs to.

4. Click the **Add** button. The **Add Countermeasure** page displays.

5. Do the following:

- In the **Product Family Name** field, verify that the product family displayed is the one you want to add the product to.

- In the **Product Name** field, enter a product name.

- Optionally, enter information in the remaining fields.

  Note: Text entered in the **Comments** field displays on the **Weekly Data Entry** and **Monthly Data Entry** pages when the user places the cursor on the product field name. The field name on these pages is followed by an asterisk (*) to denote that text is available to view.

6. Click the **Save** button. The system saves the information you entered.

7. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

Modify a Countermeasure Product

The following instructions explain how to make changes to a countermeasure product.

To modify a countermeasure product:

1. Search for the product you want to modify (refer to <u>Search for Countermeasure</u> <u>Products</u> for instructions), and then select it to display its information. The **Edit Countermeasures** page displays.

2. Make any necessary changes to the information.

    Note: Text entered in the **Comments** field displays on the **Weekly Data Entry** and **Monthly Data Entry** pages when the user places the cursor on the product field name. The field name on these pages is followed by an asterisk (*) to denote that text is available to view.

3. Click the **Save** button. The system saves the changes you made.

4. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

Delete a Countermeasure Product

The following instructions explain how to delete a countermeasure product.

Note: Countermeasure products currently being used by the system cannot be deleted.

To delete a countermeasure product:

1. Search for the product you want to delete (refer to <u>Search for Countermeasure Products</u> for instructions), and then select it to display its information. The **Edit Countermeasures** page displays.

2. Click the **Delete** button. A confirmation message displays.

3. Click the **OK** button. The system deletes the countermeasure product.

4. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close**.

Maintaining Dashboard Users

The following instructions explain how to search for, add, or modify a Dashboard user.

What would you like to do?

Search for, add, or modify a user.

Search for a User

The following instructions explain how to search for a user.

To search for a user:

1. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.
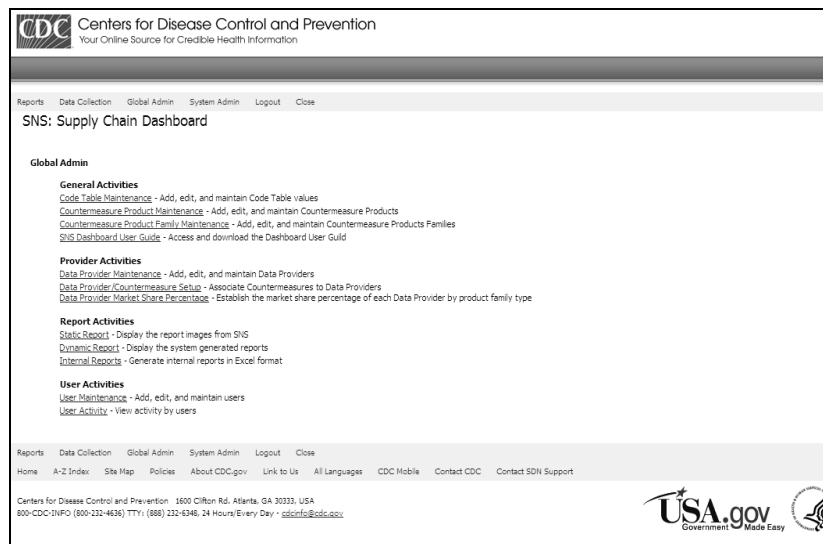
2. Under the **User Activities** heading, click the **User Maintenance** link. The **User Search** page displays with all users in the system listed.

3. To refine your search, enter search criteria in one or more of the fields, and then click the **Search** button. The users that meet the criteria are displayed.

4. Do one of the following:

    •   Sort the users in ascending or descending order by clicking a column heading and then clicking the arrow next to it.

    •   Click the page numbers to scroll through the list of users.

    •   Add a user (refer to <u>Add a User</u>)

    •   Modify a user (refer to <u>Modify a User</u>)

5. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

Add a User

The following instructions explain how to add a new user.

To add a user:

1. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.

2.   Under the **Global Admin** heading, click the **User Maintenance** link. The **User Search** page displays.

3.   Click the **Add** button. The **Add User** page displays.

4. Do the following:

- Enter information in the following fields:

  - First

  - Last

  - Email

  - Business

  - State

- Optionally, enter information in the remaining fields.

5. Click the **Save** button. The system saves the information you entered.

6. To exit the page, click one of the following menu links at the top of the page:
Reports, **Global Admin**, or **Close.**

Modify a User

The following instructions explain how to make changes to a user.

To modify a user:

1. Search for the user you want to modify (refer to <u>Search for a User</u> for instructions), and them select the user to display his/her information. The **Edit User** page displays.

2. Make any necessary changes to the information.

3. Click the **Save** button. The system saves the changes you made.

4. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

Viewing User Activity Information

The following instructions explain how you can see a report of users who have logged in to the Dashboard, as well as users who began the login process, but then declined the Purpose and Confidentiality statement. The report also provides information about the success or failure of the data collection process.

To view user activity information:

1. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.
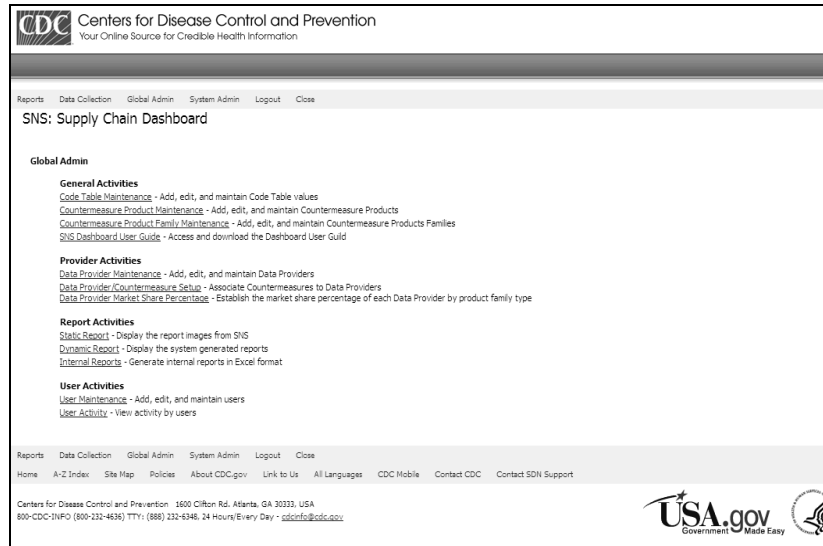
2. Under the **User Activities** heading, click the **User Activity** link. The **User Activity Report** page displays.

3. To narrow the scope of users in the list, enter filter criteria in one or more of the fields, and then click the **Go** button. The users that meet the criteria are displayed.

4. If desired, do one of the following:

   - Sort the users in ascending or descending order by clicking a column heading and then clicking the arrow next to it.

   - Click the page numbers to scroll through the list of users.

5. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

Maintaining Data Providers

The following instructions explain how to search for, add, or modify data providers.

What would you like to do?

Search for, add, or modify a data provider.

Search for a Data Provider

The following instructions explain how to search for a data provider.

To search for a data provider:

1. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.

2. Under the **Provider Activities** heading, click the **Data Provider Maintenance** link. The **Data Provider Search** page displays.

3. Specify search criteria in one or more of the following fields:

    - Business Name

    - Contact Name

    - Email

    - Type

4. Click the **Search** button. The data providers that meet the search criteria are displayed.

5. If desired, do one of the following:

    - Sort the data providers in ascending or descending order by clicking a column heading and then clicking the arrow next to it.

    - Add a data provider (refer to Add a Data Provider)

    - Modify a data provider (refer to Modify a Data Provider)

6. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

Add a Data Provider

The following instructions explain how to add a new data provider.

To add a data provider:

1. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.

2. Under the **Provider Activities** heading, click the **Data Provider Maintenance** link. The **Data Provider Search** page displays.

3. Click the **Add** button. The **Add Data Provider** page displays.

4. Enter the data provider's information in the following fields:

    - Provider

    - State

    - Contact Name

    - Email

    - This provider reports for . . .

        Note: In this field, **Manufacturing** and **Distributing** are the only check boxes that can be selected at the same time.

5. Optionally, enter information in the remaining fields.

6. Click the **Save** button. The system saves the information you entered.

7. Do one of the following:

    - Set up the countermeasures the data provider will be reporting. Click the
      Provider/Countermeasure button, and continue to Setting up Data Provider
      Countermeasures for instructions.

    - Define the market share percentage the provider has for the product family
      type of countermeasures they supply. Click the **Provider Market Share**
      button, and continue to Assigning and Viewing Data Provider Market Share
      (Assign Data Provider Market Share) for instructions.

8. To exit the page, click one of the following menu links at the top of the page:
    Reports, **Global Admin**, or **Close.**

Modify a Data Provider

The following instructions explain how to make changes to a data provider.

To modify a data provider:

1. Search for the data provider you want to modify (refer to <u>Search for a Data Provider</u>), and then select the provider to display the information. The **Edit Data Provider** page displays.

2. Make any necessary changes to the information.

   Notes about reporting options:

   • The reporting options cannot be changed if a user is assigned to the provider and/or if the provider has reported data to the Dashboard.

   • The **Manufacturing** and **Distributing** check boxes are the only ones that can be selected at the same time.

3. Click the **Save** button. The system saves the changes you made.

---

4. If desired, do one of the following:

    - Set up or change the countermeasures the data provider reports. Click the **Provider/Countermeasure** button, and continue to <u>Setting up Data Provider Countermeasures</u> for instructions.

    - Define or change the market share percentage the provider has for the product family type of countermeasures they supply. Click the **Provider Market Share** button, and continue to <u>Assigning and Viewing Data Provider Market Share (Assign Data Provider Market Share)</u> for instructions.

5. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

Setting up Data Provider Countermeasures

The following instructions explain how to specify the countermeasures that are reported by a data provider. The countermeasures you select are displayed on the **Weekly Data Entry** and **Monthly Data Entry** pages.

To set up data provider countermeasures:

1. Is the **Data Provider/Countermeasure Setup** page currently displayed on your screen?

    *   If **Yes**, skip to step 4.

    *   If **No**, continue to step 2.

2. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.
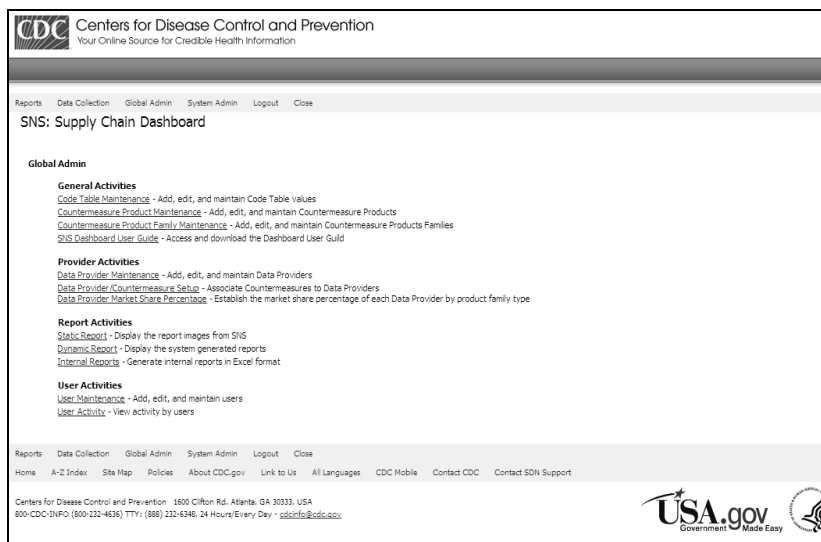
3. Under the **Provider Activities** heading, click the **Data Provider/Countermeasure Setup** link. The **Data Provider/Countermeasure Setup** page displays.

4. In the **Data Provider** field, select the name of the provider you want to assign countermeasures to, and click the **Go** button. Additional fields display on the page.

5. How many countermeasures do you want to assign?

- **One countermeasure:** In the **Available Countermeasures** list, select the countermeasure you want to assign, and click the **Add** button. The countermeasure moves to the **Countermeasure(s) to be reported** list.

- **All countermeasures:** Click the **Add All** button. All countermeasures move to the **Countermeasure(s) to be reported** list.

6. To remove a single countermeasure from the **Countermeasure(s) to be reported** list, select the countermeasure, and click the **Remove** button. To remove all countermeasures, click the **Remove All** button.

7. Click the **Save** button. The system saves the information you entered.

8. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

Assigning and Viewing
Data Provider Market Share

Data providers' market share by product family type is used when reporting order fill rating to DSNS. The following instructions explain how to assign market share percentages to data providers, as well as how to view the existing percentages assigned to them.

What would you like to do?

Assign or view data provider market share.

Assign Data Provider Market Share

The following instructions explain how to assign a market share percentage to one or more data providers.

To assign a data provider's market share:

1. Is the **Data Provider Market Share** page currently displayed on your screen?

    - If **Yes**, skip to step 4.

    - If **No**, continue to step 2.

2. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.

3. Under the **Provider Activities** heading, click the **Data Provider Market Share Percentage** link. The **Data Provider Market Share** page displays.

4. Do the following:

   - In the **Product Family Type** field, select the product family type associated with the data provider.

   - In the **Data Provider Type** field, select the type of data provider you are entering market share percentages for.

     You cannot select **Retailer** in this field if the **Product Family Type** field displays **Respiratory Protective Devices**, since Retailers do not report on respiratory protective devices.

   - In the **Date As Of** field, enter today's date in mm-dd-yyyy format or click in the field to display a calendar, and then select the date.

   - Click the **Go** button. Additional fields display on the page.

5. For each provider you are interested in, enter a market share percentage in the **Percentage** field.

6. Click the **Save** button. The system saves the information you entered and places today's date in the **Start Date** column for each provider who has a market share percentage.

   Each provider's market share is effective as of the date displayed in the **Start Date** column. The **End Date** column is currently blank, but the system populates it with yesterday's date if you changed a provider's market share percentage today.

   The system keeps track of a provider's market share so that it can be accurately reported on any given date.

   Example:

   • **Step 1:** On 01-27-2010, you enter a market share percentage of 5.0 for the data provider named AAA – Distributor.

   • **Step 2:** On 01-28-2010, you change the provider's market share to 6.0.

   • **Step 3:** You run a report with an effective date of 01-27-2010. The report shows the provider's market share as being 5.0 percent.

   • **Step 4:** You run a second report with an effective date of 01-28-2010. The report shows the provider's market share as being 6.0 percent.

7. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

View Data Provider Market Share

The following instructions explain how to view the market share percentages of data providers.

To view a data provider's market share:

1. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.
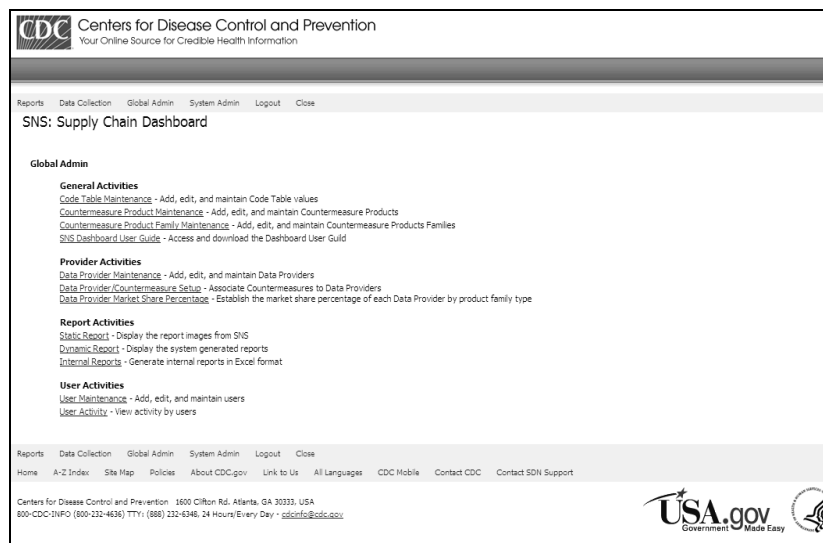
2. Under the **Provider Activities** heading, click the **Data Provider Market Share Percentage** link. The **Data Provider Market Share** page displays.
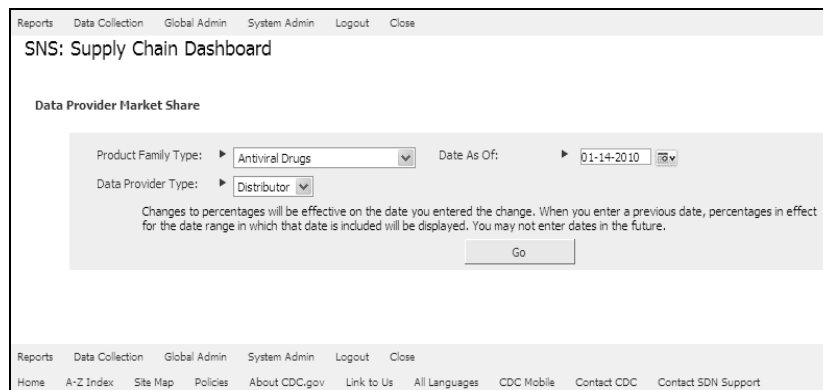
3. Do the following:

    - In the **Product Family Type** field, select the product family type associated
      with the data provider.

    - In the **Data Provider Type** field, select the type of data provider whose
      market share percentages you are viewing.

      You cannot select **Retailer** in this field if the **Product Family Type** field
      displays **Respiratory Protective Devices**, since Retailers do not report on
      respiratory protective devices.

    - In the **Date As Of** field, specify the effective date of the percentages. You can
      enter the date in mm-dd-yyyy format, or click in the field to display a calendar
      and select the date.

    - Click the **Go** button. A list of data providers displays.

    Each provider's market share percentage is shown, along with the start and end
    dates designating when the percentage was effective. If the **End Date** column
    is blank, this means the percentage is still effective.

    If a date other than today's date is shown in the **Date As Of** field, the
    information on this page cannot be modified.

4. To exit the page, click one of the following menu links at the top of the page:
    Reports, **Global Admin**, or **Close.**

Switching Between Static and Dynamic Reports

The system supports both static reports and dynamic reports.

- **Static reports** are aggregated reports that are created by DSNS, uploaded to the Dashboard, and stored as an image file in the database.

- **Dynamic Reports** are aggregated reports generated by the system using the data entered into the **Weekly Data Entry** and **Monthly Data Entry** pages and stored in the database as data.

The default report type is stored in the database and displays when a user clicks the **Reports** menu link. Upon request, the System Administrator can change the default type.

To switch between static and dynamic reports:

1. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.
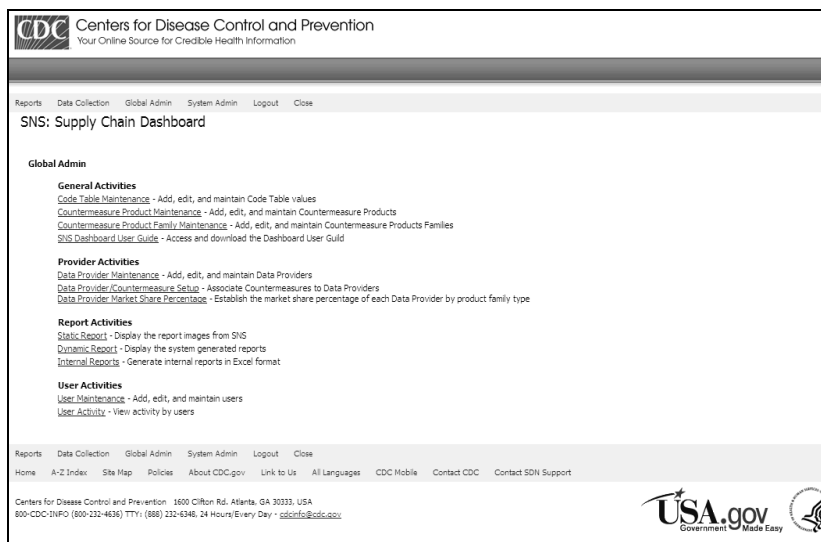
2. Under the **Global Admin** heading, click the **Static Report** link. The **Static Report** page displays.
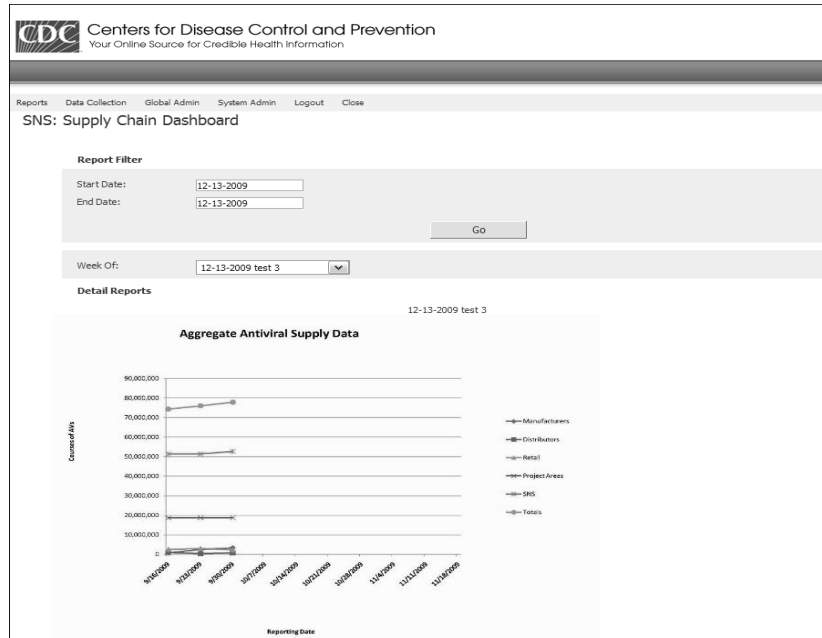
3. To view dynamic reports, click the **Global Admin** menu link, and then click the **Dynamic Report** link. The **Dynamic Report** page displays.
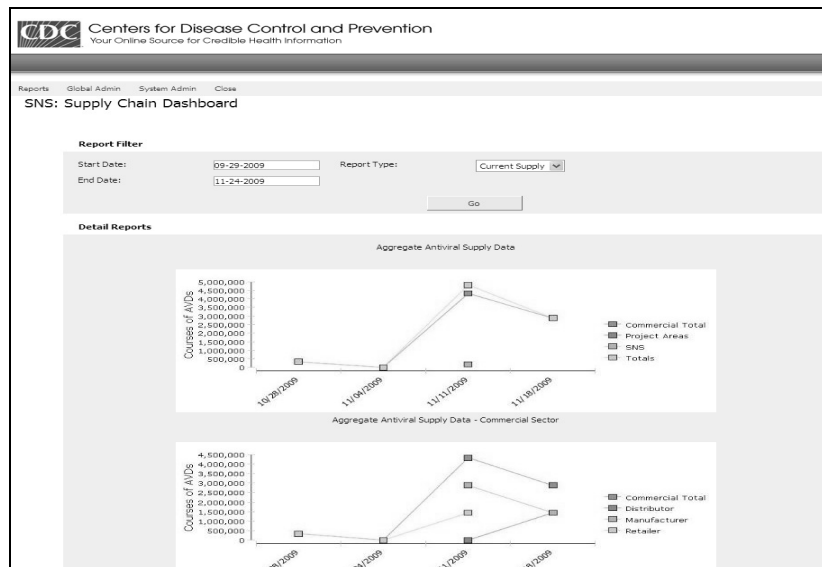
4. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

Requesting Internal Reports

Internal reports are used by DSNS and are generated by the system via a Global Admin activity on the Dashboard.

Refer to <u>Appendix D: Global Admin Internal Report Samples</u> for examples of the output for each type of report.

The following internal reports are available:

• Commercial Sector: Dashboard reporting history

• Current Supply: Aggregated totals by Manufacturers, Distributors, Retailers, DSNS, and Project Area/State Stockpile for a specified week.

• Order Fill Rating: Aggregated totals of reported ratings by Distributors and Retailers.

• Production Total/Uncommitted: Aggregated totals for Manufactures and some Distributors that rebrand products for aggregated production totals and uncommitted totals.

To request internal reports:

1. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.
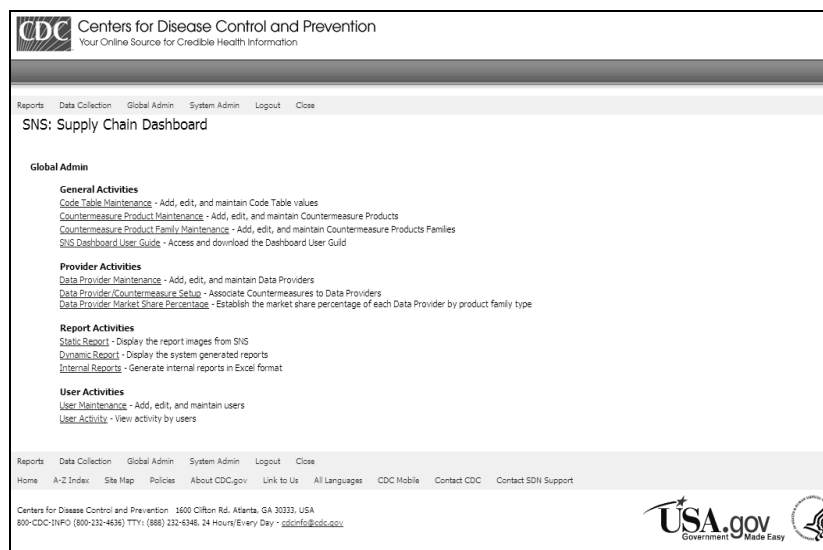
2. Under the **Global Admin** heading, click the **Internal Reports** link. The **Internal Reports** page displays.

3. Enter the **As of Date** and the **As of End Date** for the date ranges you want the reports.

4. Click the **Run Report** for the report you want to generate.

    Note: The reports will be generated as Excel spreadsheets; the report names use the following naming convention:

    - mm-dd-yyyyReportStatus

    - mm-dd-yyyyCurrentSupply

    - mm-dd-yyyyOrderFillRating

    - mm-dd-yyyyProduction

    where **mm-dd-yyyy** represents the Wednesday report date of the reporting period.

    Even if SNS requests for the query to run on a Thursday, all of the reports for the week should have been submitted, uploaded or entered with Wednesday's date, even if submitted late.

    The date in the report name should always be a Wednesday date.

5. The requested report is generated and displays in a Microsoft Excel spreadsheet.

6. To exit the page, click one of the following menu links at the top of the page: **Reports**, **Global Admin**, or **Close.**

Viewing an Online Version of the
SNS Dashboard User Guide

The following instructions explain how to view an online version of the user guide.

To view the SNS Dashboard User Guide:

1. On the Dashboard, click the **Global Admin** menu link. The **Global Admin** page displays.
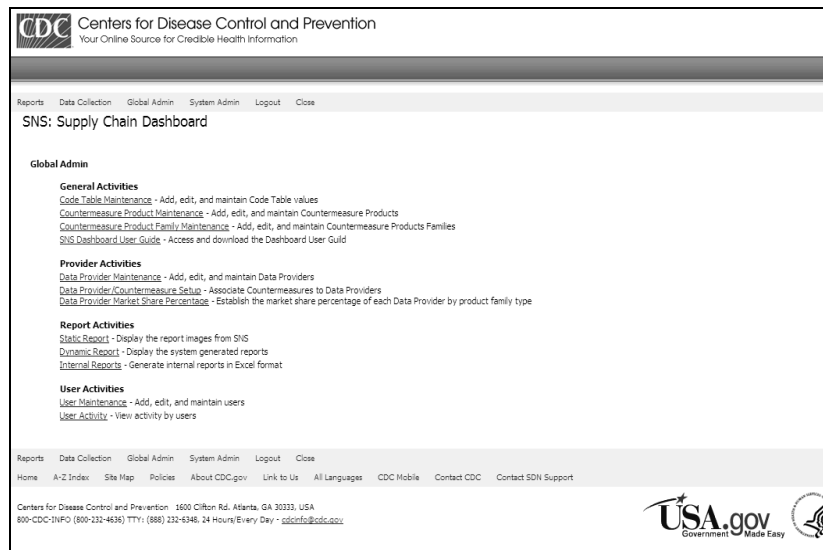
2. Under the **General Activities** heading, click the **SNS Dashboard User Guide** link. The user guide displays. If desired, you can download the guide to your computer's hard drive.

Appendix A:
SNS: Supply Chain Dashboard
Data Spreadsheets

Current Supply Dashboard

For the **current supply** portion, data reflects on-hand, available product that has not been committed to customers (refer to the following figure).

Proprietary Data not to be disclosed. For SNS use only.					
Current Supply					
COMPANY NAME:			Enter Current Supply Amount (ex 123,456)		
Date:			Manufacturers	Distributors	Retailers
Antiviral Drugs	Oseltamivir	75mg (courses)			
		45mg (courses)			
		30mg (courses)			
		Suspension (bottles)			
	Zanamivir	Diskhaler (courses)			
Respiratory Protective Devices	N95 Respirators	NIOSH approved			
		NIOSH approved / FDA certified			
	Surgical Masks	High Barrier*			
		Other			
*classification as described by ASTM F2100					
Manufactures, Distributors, or Retailers enter **number** of items on hand and available (**not committed to customers**).					
Dashboard aggreagted reports will show anonymous aggregated total units on hand for each reporting period.					
Proprietary Data not to be disclosed. For SNS use only.					

Figure 3: Current Supply – Manufacturers, Distributors, and Retailers

Figure 3 shows the aggregated total of all data provided by manufacturers, distributors, and retailers for the current inventory.

- Oseltamivir capsules and Zanamivir data are reported as courses of treatment. Oseltamivir suspension data is reported as bottles.

- Respiratory protective device data is reported by individual respirator and mask.

The initial version of the Dashboard does not differentiate the various models of respirators and surgical masks; they are reported under the broad categories of N95 respirators and surgical masks.

Future versions of the Dashboard may include reporting respirator and mask data by models and types, the determination of how that can be accomplished reliably and efficiently based on categorization.

Proprietary Data not to be disclosed. For SNS use only.					
Current Supply					
Entity:	DSNS				
Date:			States & Project Areas	SNS	Est Wkly Prescriptions
Antiviral Drugs	Oseltamivir	75mg (courses)			
		45mg (courses)			
		30mg (courses)			
		Suspension (bottles)			
	Zanamivir	Diskhaler (courses)			
Respiratory Protective Devices	N95 Respirators	NIOSH approved			
		NIOSH approved / FDA certified			
	Surgical Masks	High Barrier*			
		Other			
*classification as described by ASTM F2100					
Mfgs, dist, and retailers enter number of items on hand and available (**not committed to customers**).					
State will submit quantity on hand and available for deployment.					
SNS enter quantity on hand and available for deployment in the SNS.					
Dashboard aggreagted reports will show total units on hand for each reporting period					
Proprietary Data not to be disclosed. For SNS use only.					

Figure 4: Current Supply – States & Project Areas and SNS

Figure 4 shows the aggregated total of all data provided by states, project areas, and SNS for the current inventory.

Order Fill Status Dashboard

The **order fill status** portion includes assessments of distributor and retailer ability to fill orders and is rated as green, yellow, or red (refer to the following figure).

Figure 5: Order Fill Status

Figure 5 shows the data provided by the distributors and retailers.

Order fill status is rated in the following manner:

- **Green**: Orders are being filled in the usual timeframe for the item and the company— business as usual with sufficient inventory to meet orders.

- **Yellow**: When some issues exist with filling orders—inventories are being depleted at a rapid pace and replenishment is in question.

- **Red**: When many issues exist with filling orders—widespread supply shortages and limited or no replenishment significantly impact the ability to fill orders.

The Dashboard shows the number of reporting retailers and distributors in each rating area to provide an overall perspective. Since N95 respirator production for the next 6 to 12 months is committed to filling existing orders, it will likely be assessed as Red for an extended time. We will look for alternatives in the future to add clarity to the assessment and rating for N95 respirator production.

Production Dashboard

The **production** portion of the Dashboard includes aggregate manufacturer data of expected production for the next twelve months for use in the U.S. (refer to the following figure).

The quantity of the production each month that is uncommitted and available for purchase is also included. Production data is collected on a monthly basis, since weekly changes are not expected.

Proprietary Data not to be disclosed. For SNS use only.								

Production (Total/Uncommitted) for Manufacturers (see foot notes)

COMPANY NAME:			Manufacturers (see foot notes)					
Date:			Select X from drop down					

Production (Total/Uncommitted)   Date:

Months 1-3			Oct-09		Nov-09		Dec-09	
			Total	Uncommitted	Total	Uncommitted	Total	Uncommitted
Antiviral Drugs	Oseltamivir	75mg (courses)						
		45mg (courses)						
		30mg (courses)						
		Suspension (bottles)						
	Zanamivir	Diskhaler (courses)						
Respiratory Protective Devices	N95 Respirators	NIOSH approved						
		NIOSH approved / FDA certified						
	Surgical Masks	High Barrier*						
		Other						

Months 4-6			Jan-10		Feb-10		Mar-10	
			Total	Uncommitted	Total	Uncommitted	Total	Uncommitted
Antiviral Drugs	Oseltamivir	75mg (courses)						
		45mg (courses)						
		30mg (courses)						
		Suspension (bottles)						
	Zanamivir	Diskhaler (courses)						
Respiratory Protective Devices	N95 Respirators	NIOSH approved						
		NIOSH approved / FDA certified						
	Surgical Masks	High Barrier*						
		Other						

Months 7-9			Apr-10		May-10		Jun-10	
			Total	Uncommitted	Total	Uncommitted	Total	Uncommitted
Antiviral Drugs	Oseltamivir	75mg (courses)						
		45mg (courses)						
		30mg (courses)						
		Suspension (bottles)						
	Zanamivir	Diskhaler (courses)						
		NIOSH approved						

Figure 6: Production

Figure 6 shows the data provided by the manufacturers and, in some cases, distributors (in the cases where distributors "private label" the products).

Data is reported in the same unit of measure as in the supply section:

• Oseltamivir capsules

• Zanamivir in courses

- Oseltamivir suspension in bottles

- Respiratory protective devices in individual respirators and masks

Also, any distributors that purchase N95 respirators or other items for private label use in the U.S. from overseas manufacturers that are not part of the Dashboard effort and not included in manufacturer reporting are asked to provide production data.

Appendix B:
Security Requirements Overview

It is imperative that the commercial supply chain providers' data is protected both from a data-tampering perspective and a viewing perspective. To achieve data security, the following measures have been taken:

- Purpose and Confidentiality Statement

    - The Purpose and Confidentiality statement is the first page of the on-line capability

    - Users cannot enter unless they agree to the statement.

- Authentication

    - SDN certificates

    - Managed set of users; namely, only those authorized will be issued a digital certificate

- Authorization/Access Control

    - User name must be tied to organization type (for phase 1)

    - User/organization will be given access only to specific data view(s).

- Limiting Output

    - No application menus to save, print, copy, paste, etc.

    - No Control key functionality (e.g., CTRL + P)

    - Limited print screen functionality

    - Users can view data only

Appendix C:
Purpose and Confidentiality Statement

PURPOSE AND CONFIDENTIALITY STATEMENT

Through the *Supply Chain Dashboard* web portal, i.e. "Dashboard", CDC is providing access to confidential data that has been voluntarily provided to CDC in order to establish a national inventory of critical antiviral countermeasures. The "Dashboard" provides aggregate data describing the quantities of available antiviral drugs and Personal Protective Equipment as reported by manufacturers, distributors and retailers at various stages of the commercial supply chain. The information contained in these reports is intended to assist federal and state partners in making decisions about deployment of materials from federal and state stockpiles in response to the ongoing public health emergency. A number of restrictions apply.

Access to this confidential information is limited to pre-approved state and federal government personnel. As a condition of receiving this data, and notwithstanding any state law or local ordinance, CDC requires that the recipient agree to the following stipulations and acknowledgements:

- The recipient of this data acknowledges that they have been granted access to this site as an authorized user through the CDC Secure Digital Network.

- The recipient will not download, copy, print, release, disclose, or further distribute any data or other information accessed through the "Dashboard" web portal.

- The recipient will not allow access to this portal by any individuals other than those specifically approved and as identified by the Digital Certificate.

- The recipient understands and agrees to these confidentiality obligations and to use the information solely for the purposes of the "Dashboard Initiative".

By clicking the *AGREE* button below, you indicate your acceptance of these obligations and agreements. If you do not agree to the terms of this agreement, you should click DECLINE and discontinue access to the "Dashboard" web portal.

Appendix D:
Global Admin Internal Report Samples

Commercial Sector – Dashboard Reporting History

Note: The actual names of the data providers would actually show on the report. Also, the actual report format may be different; the information will be the same.

Dashboard Reporting History	09/17/09	09/23/09	09/30/09	10/07/09	10/14/09	10/21/09	10/28/09	11/04/09	11/11/09	11/18/09
Manufacturers										
xxx1	X	X	X	X	X	X	X	X	X	X
xxx2		X	X	X	X	X	X	X	X	X
xxx3						X	X	X	X	X
xxx4	X	X		X	X	X	X	X	X	X
xxx5			X	X	X	X	X	X	X	X
xxx6					X	X	X	X	X	X
xxx7		X	X	X	X	X	X	X	X	X
xxx8		X		X	X	X	X	X	X	X
xxx9			X	X	X	X	X		X	X
Distributors										
ddd1			X	X		X	X	X	X	X
ddd2					X	X		X	X	X
ddd3	X	X	X	X	X	X	X	X	X	X
ddd4	X	X	X	X	X	X	X	\	X	X
ddd5		X	X	X	X	X	X	X	X	X
ddd6	X	X	X	X	X	X	X	X	X	X
Retailers										
rrr1		X	X	X	X	X	X		X	X
rrr2		X	X	X	X	X	X	X	X	X
rrr3	X	X	X	X	X	X	X	X	X	X
rrr4	X	X		X	X	X	X	X	X	X

Figure 7: Internal Report - Commercial Sector Dashboard Reporting History

Figure 7 shows the Dashboard reporting history for the commercial sector (Manufacturers, Distributors, and Retailers).

Current Supply – Aggregated Totals

Proprietary Data not to be disclosed. For SNS use only.								
Curent Supply		As of:	11/18/09	11/18/09	11/18/09	11/18/09	11/13/09	11/13/09	11/18/09
			Manufacturers	+ Distributors	+ Retailers	= Commercial Supply Totals	+ State Stockpiles	+ SNS	= TOTALS
Antiviral Drugs	Zanamivir	Diskhaler (courses)	####	###	####	0	#REF!	####	#REF!
	Oseltamivir	75 mg (courses)	####	###	####	0	#REF!	####	#REF!
		45 mg (courses)	###	###	####	0	#REF!	####	#REF!
		30 mg (courses)	####	####	####	0	#REF!	####	#REF!
		Suspension (bottles)	####	####	####	0	#REF!	####	#REF!
						0	#REF!		#REF!
		TOTALS	0	0	0	0	#REF!	0	#REF!
			Manufacturers	+ Distributors	+ Retailers	= Commercial Supply Totals	+ State Stockpiles	+ SNS	= TOTALS
Respiratory Protective Devices	N95 Respirators	NIOSH only	####	####	####	0	#REF!	####	#REF!
		both NIOSH/FDA	####	####	####	0	#REF!	####	#REF!
	Surgical Masks	High Barrier*	####	####	####	0			0
		Other	####	####	####	0	#REF!	####	#REF!
						0			#REF!
		TOTALS	0	0	0	0	#REF!	0	#REF!
*classification as described by ASTM F2100									
Proprietary Data not to be disclosed. For SNS use only.									
Enter State and SNS Data in the respective columns on this sheet.									
	Last	Current							
Date - Commercial	11/11/09	11/18/09							
Date - SNS/State	11/06/09	11/13/09							

Figure 8: Internal Reports - Current Supply Aggregated Totals

Figure 8 shows the aggregated totals for the current supply of antiviral drugs and respiratory protective devices.

Order Fill Rating – Aggregated Totals

Proprietary Data not to be disclosed. For SNS use only.

Order Fill Rating	As of:	11/18/09		Distributors				Retailers		
			Red	Yellow	Green		Red	Yellow	Green	
Antiviral Drugs	Oseltamivir	75mg (courses)	0	3	2	5	0	3	1	4
		45mg (courses)	2	1	2	5	1	2	1	4
		30mg (courses)	2	1	2	5	1	3	0	4
		Suspension (bottles)	5	0	0	5	4	0	0	4
	Zanamivir	Diskhaler (courses)	0	0	5	5	0	1	3	4
Respiratory Protective Devices	N95 Respirators	NIOSH only	3	1	1	5				
		both NIOSH/FDA	3	1	1	5				
	Surgical Masks	High Barrier*	2	2	1	5				
		Other	2	2	1	5				

Proprietary Data not to be disclosed. For SNS use only.

Green - Orders are being filled in the normal timeframe, and there is sufficient inventory to meet demand
Yellow - There are some issues with filling orders; inventories are being depleted rapidly and replenishment is in question
Red - There are major issues with filling orders; widespread supply shortages and limited or no replenishment

Dashboard reports will show the number (count) of distributors and retailers in each rating area for the reporting period.

Figure 9: Internal Reports - Order Fill Rating

Figure 9 shows the aggregated totals for the order fill rating of antiviral drugs and respiratory protective devices.

Production Total/Uncommitted – Aggregated Totals

This sheet is compiled manually.								
Proprietary Data not to be disclosed. For SNS use only.								
Production (Total/Uncommitted) Data, as of:		11/18/09						
Months 1-3				Oct-09		Nov-09		Dec-09
			Total	Uncommitted	Total	Uncommitted	Total	Uncommitted
Antiviral Drugs	Oseltamivir	75mg (courses)			¥¥¥¥	¥¥¥¥	¥¥¥¥	¥¥¥¥
		45mg (courses)			¥¥¥¥	¥¥¥¥	¥¥¥¥	
		30mg (courses)			¥¥¥¥	¥¥¥¥	¥¥¥¥	
		Suspension (bottles)			0	0	¥¥¥¥	0
	Zanamivir*	Diskhaler (courses)			¥¥¥¥	0	¥¥¥¥	0
Respiratory Protective Devices	N95 Respirators	NIOSH			¥¥¥¥			
		NIOSH/FDA			¥¥¥¥		¥¥¥¥	
	Surgical Masks	High Barrier			¥¥¥¥	0	¥¥¥¥	0
		Other			¥¥¥¥	0	¥¥¥¥	0
*Until 6 MPO is confirmed all production is uncommitted								
Months 4-6				Jan-10		Feb-10		Mar-10
			Total	Uncommitted	Total	Uncommitted	Total	Uncommitted
Antiviral Drugs	Oseltamivir	75mg (courses)	tbd		tbd		tbd	
		45mg (courses)	tbd		tbd		tbd	
		30mg (courses)	tbd		tbd		tbd	
		Suspension (bottles)	¥¥¥¥	0	¥¥¥¥	0	tbd	
	Zanamivir	Diskhaler (courses)	¥¥¥¥	0				
Respiratory Protective Devices	N95 Respirators	NIOSH						
		NIOSH/FDA						
	Surgical Masks	High Barrier	¥¥¥¥	0	¥¥¥¥	0	¥¥¥¥	0
		Other	¥¥¥¥	0	¥¥¥¥	0	¥¥¥¥	0
Months 7-9				Apr-10		May-10		Jun-10
			Total	Uncommitted	Total	Uncommitted	Total	Uncommitted
Antiviral Drugs	Oseltamivir	75mg (courses)						
		45mg (courses)						
		30mg (courses)						
		Suspension (bottles)						
	Zanamivir	Diskhaler (courses)						
Respiratory Protective Devices	N95 Respirators	NIOSH						
		NIOSH/FDA						
	Surgical Masks	High Barrier	¥¥¥¥	0	¥¥¥¥	0	¥¥¥¥	0
		Other	¥¥¥¥	0	¥¥¥¥	0	¥¥¥¥	0
Months 10-12				Jul-10		Aug-10		Sep-10
			Total	Uncommitted	Total	Uncommitted	Total	Uncommitted
Antiviral Drugs	Oseltamivir	75mg (courses)						
		45mg (courses)						
		30mg (courses)						
		Suspension (bottles)						
	Zanamivir	Diskhaler (courses)						
Respiratory Protective Devices	N95 Respirators	NIOSH						
		NIOSH/FDA						
	Surgical Masks	High Barrier	¥¥¥¥	0	¥¥¥¥	0	¥¥¥¥	
		Other	¥¥¥¥	0	¥¥¥¥	0	¥¥¥¥	
Proprietary Data not to be disclosed. For SNS use only.								

Figure 10: Internal Reports - Production Totals/Uncommitted

Figure 10 shows the aggregated totals for the production and uncommitted supplies of antiviral drugs and respiratory protective devices.